



An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation



Digital Services & Online Safety Survey

February 2021

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Prepared by Red C Research
on behalf of ComReg



Overview



1

Use & Benefits of Online Services



2

Reliability of Internet Connection



3

Digital Privacy & Awareness and Perceptions of online harms



4

Online Safety - Adults

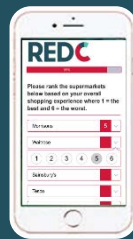


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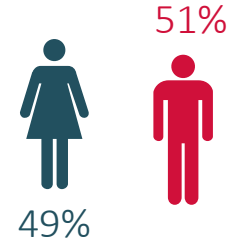
Online Safety – Parental Control

Methodology

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



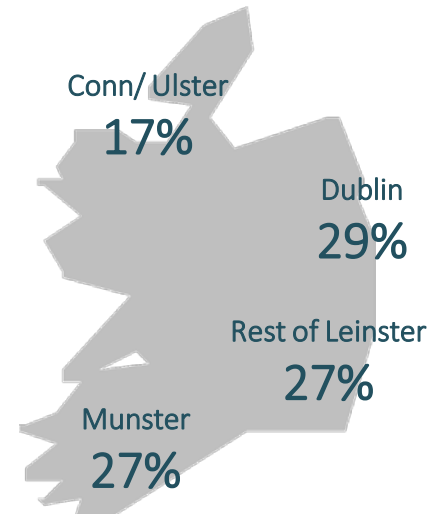
Gender



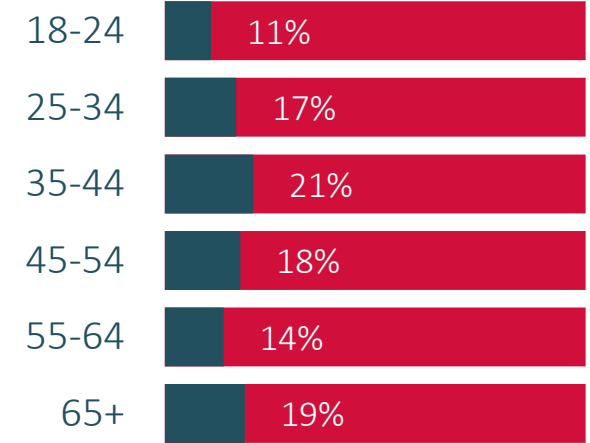
Parents



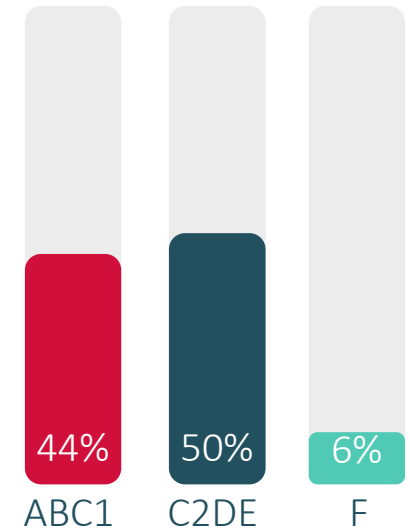
Region



Age



Social Class



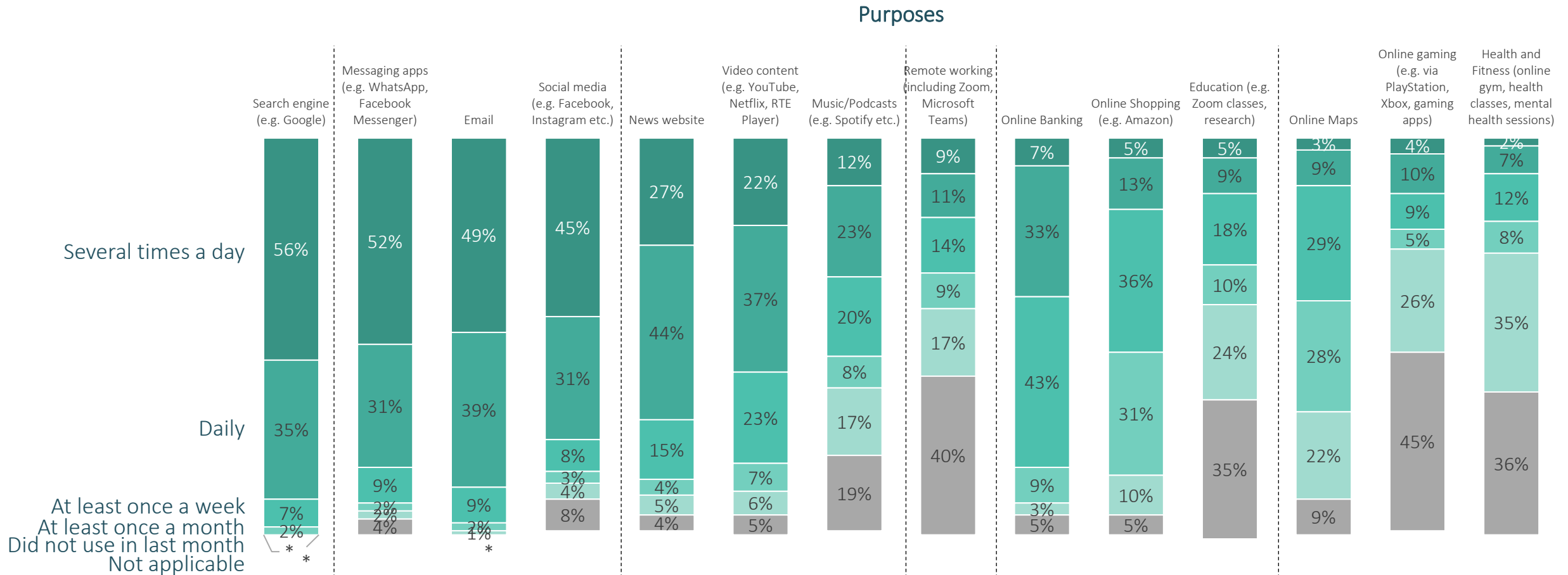
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Use & Benefits of Online Services



In the last month, how often would you say you personally used online services for the following purposes? Think about your personal usage on your phone, tablet, laptop etc.

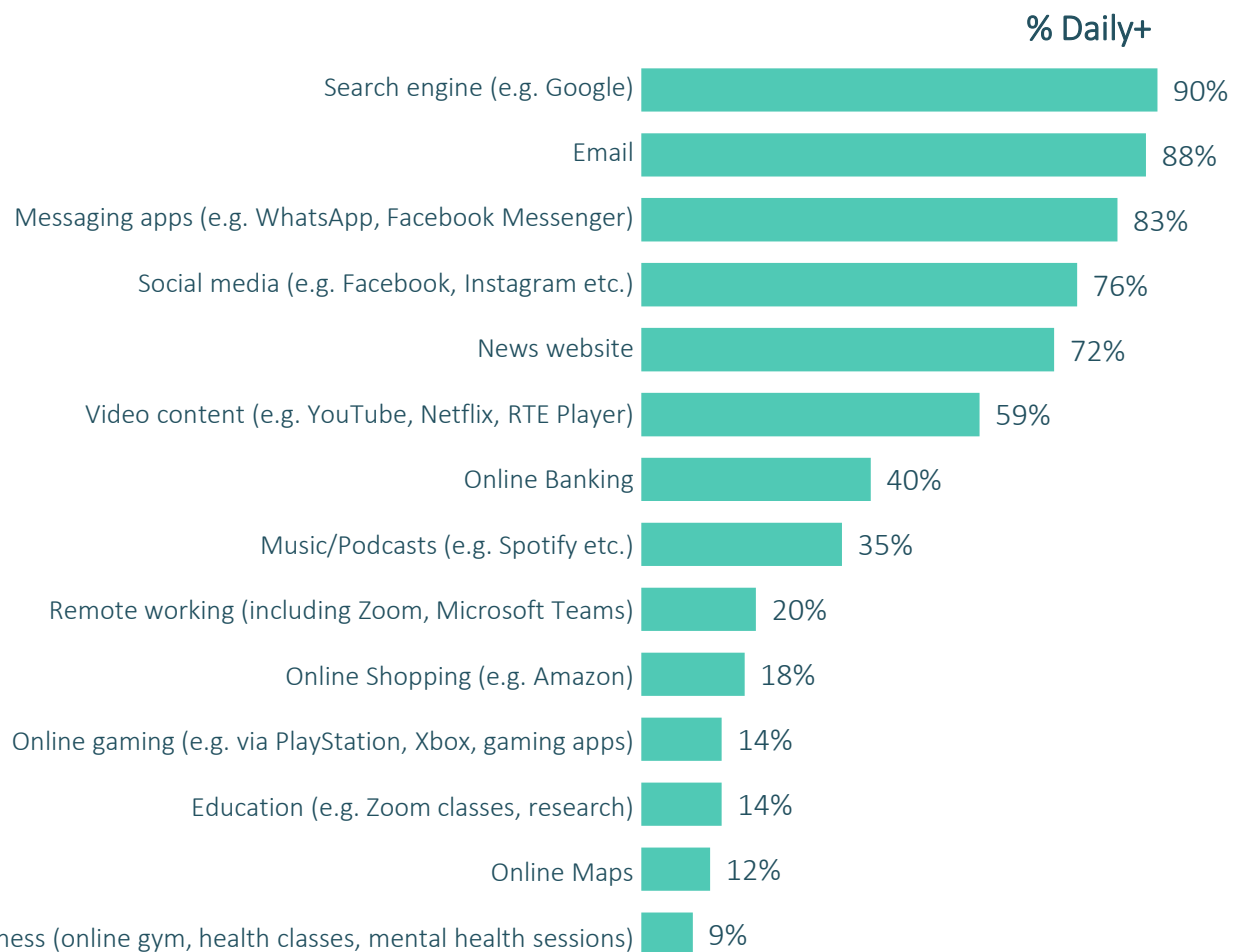
Search & Communication most frequently used purposes



In the last month, how often would you say you use online services for the following purposes?

Daily usage of services is strongly correlated with age

A notable exception is the usage of news websites, where those aged under 35 visit the lowest and daily usage is above average among those aged 55+.

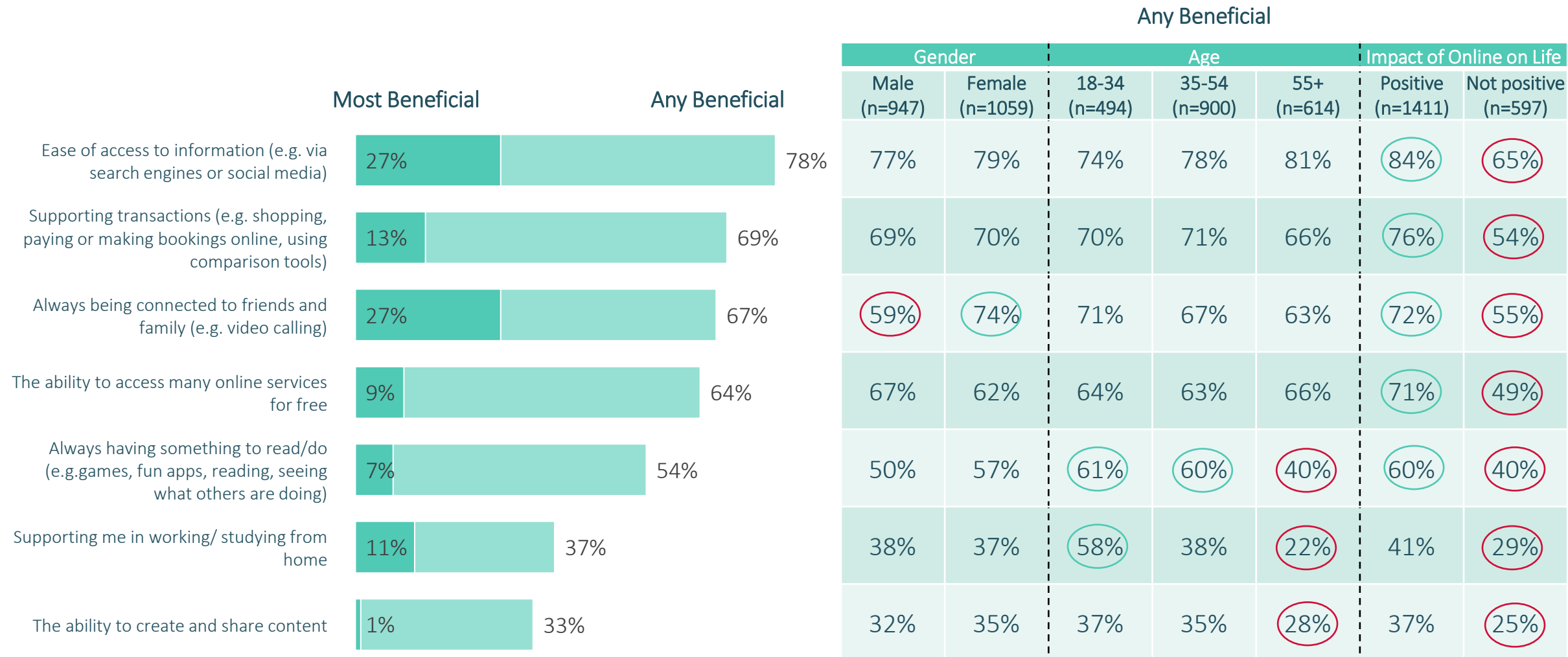


Gender		Age			Impact of Online on Life	
Male (n=947)	Female (n=1059)	18-34 (n=494)	35-54 (n=900)	55+ (n=614)	Positive (n=1411)	Not positive (n=597)
92%	89%	93%	94%	84%	93%	84%
90%	86%	92%	91%	81%	89%	85%
80%	87%	90%	86%	74%	85%	79%
71%	81%	85%	80%	64%	79%	69%
79%	64%	67%	72%	74%	75%	64%
64%	54%	76%	64%	39%	61%	53%
41%	39%	51%	40%	31%	41%	36%
37%	34%	60%	37%	15%	37%	32%
22%	18%	39%	18%	7%	22%	13%
15%	20%	25%	22%	7%	20%	13%
16%	13%	23%	16%	6%	15%	12%
14%	13%	27%	12%	6%	15%	11%
16%	9%	22%	12%	5%	13%	11%
10%	8%	20%	8%	2%	9%	8%

Please read through the list and state which, if any, are beneficial to you?

Information and Connection are primary benefits of online services

Those aged under 54 are more likely to see online services as beneficial while over half (58%) of those aged under 35 report supporting working/studying from home as a benefit.



2

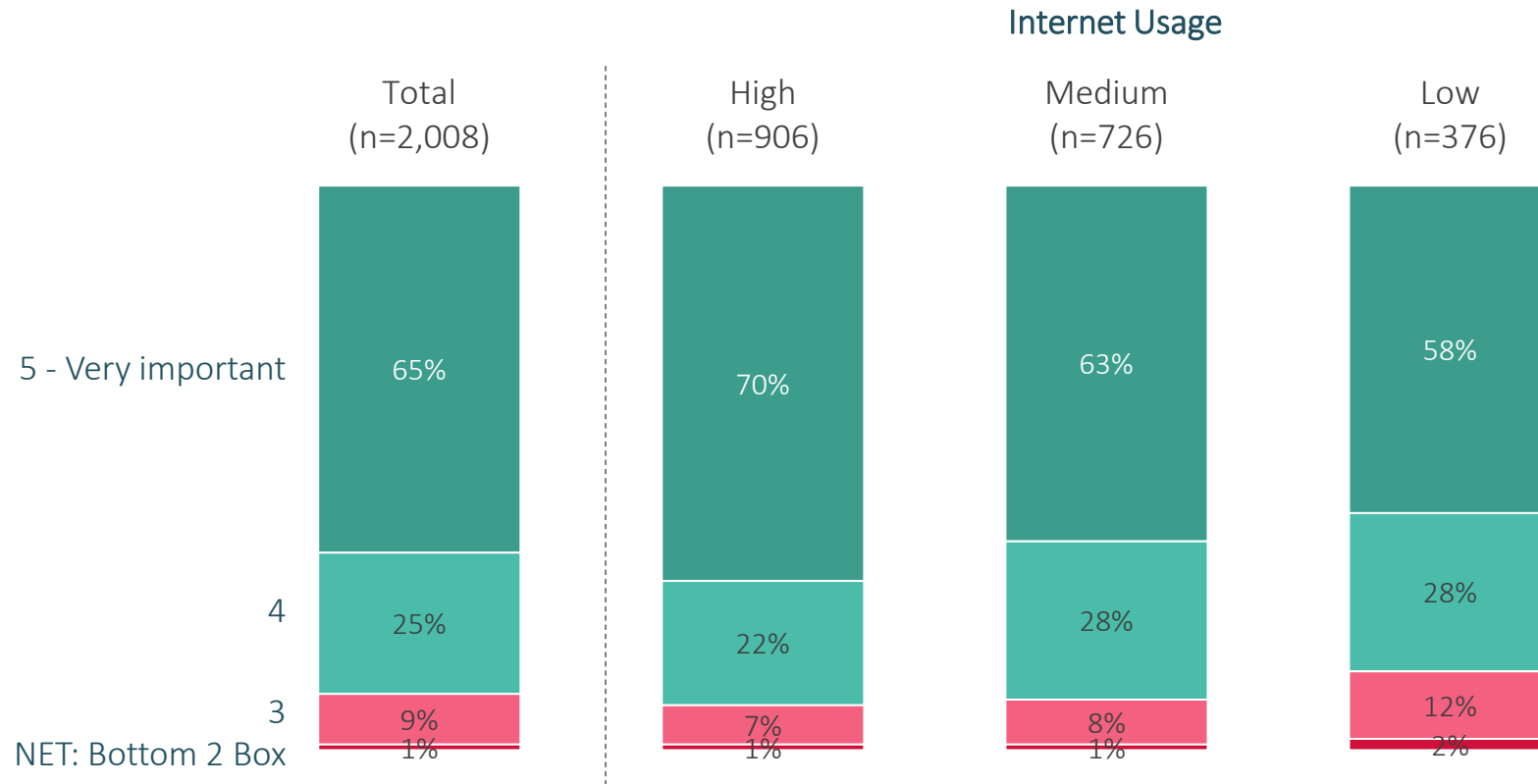
Reliability of Internet Connection



How important is the reliability of your internet connection to you?

Reliability of Internet Connection is important to 90% of Users.

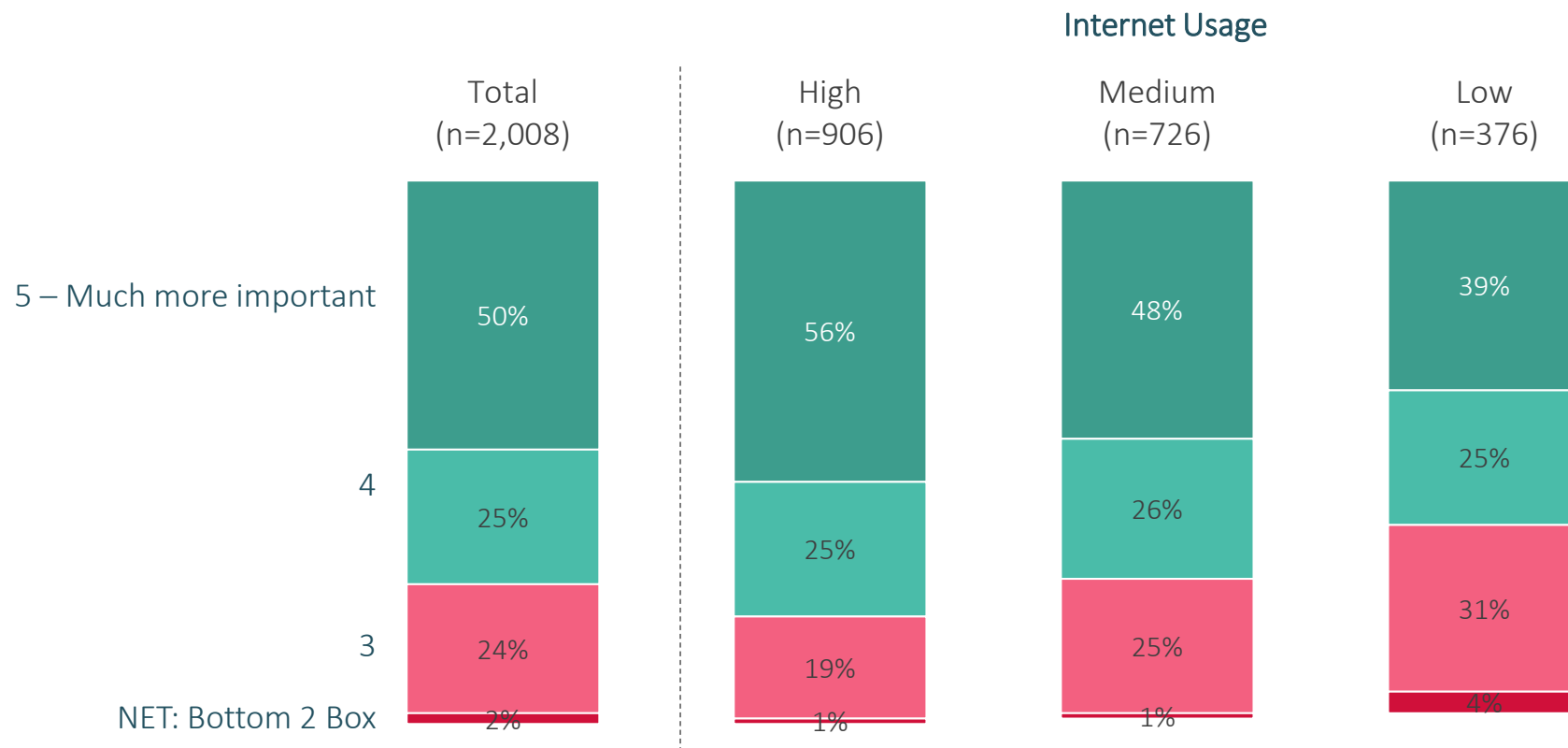
The degree to which it is important (i.e. Very important or Top 2 Box) varies by level of internet usage, but even among low level internet users, 86% find reliability of internet connection important.



Has the reliability of your internet connection become more important to you in the last year?

For 75%, reliability of connection grew in importance in past year

Growth in importance is particularly strong among those with high usage of online services. Only 24% of all users say importance hasn't changed and negligible proportion claiming it is now less important.



Thinking about your usage of the below, which of the following do you primarily rely upon to connect to these online services?

Fixed Broadband is primary method of connecting for video services

	Video content (e.g. YouTube, Netflix, RTE Player) (n=1803)	Remote working (including Zoom, Microsoft Teams) (n=889)	Education (e.g. Zoom classes, research) (n=861)	Health and Fitness (online gym, health classes, mental health sessions) (n=589)
Fixed Internet/ Broadband at home through a landline, fibre, cable TV or wireless service provider	69%	80%	78%	59%
Smartphone with access to mobile data (e.g. 3G/4G)	25%	11%	14%	34%
3G/4G Mobile Broadband (through a USB stick / dongle attached to computer, Mi-Fi devices, 3G/4G sim card in Tablets)	5%	7%	5%	3%
Not sure	1%	2%	3%	5%

3

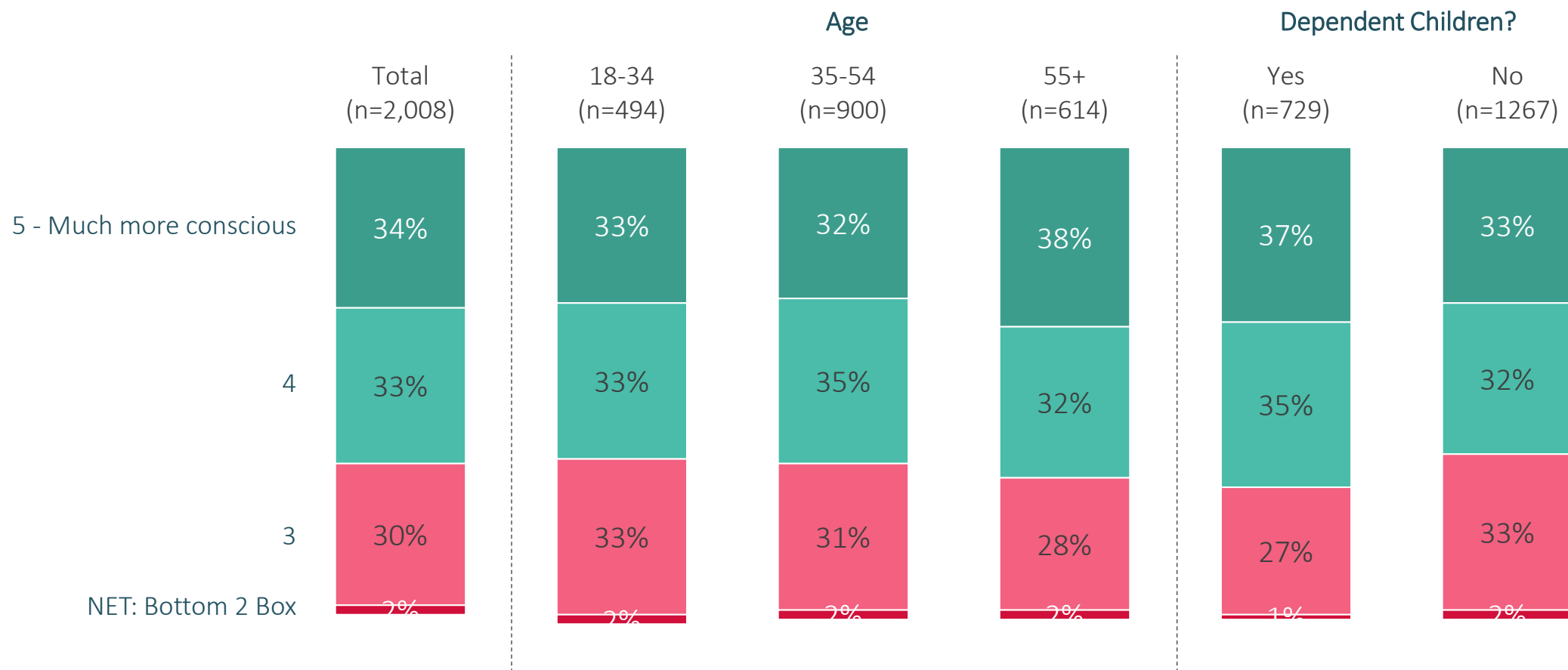
Digital Privacy & Awareness and Perceptions of Online Harms



Would you say you have become more or less conscious of your privacy online? (e.g. sharing your name, date of birth, address etc. online)

67% of adults have become more conscious of their privacy online

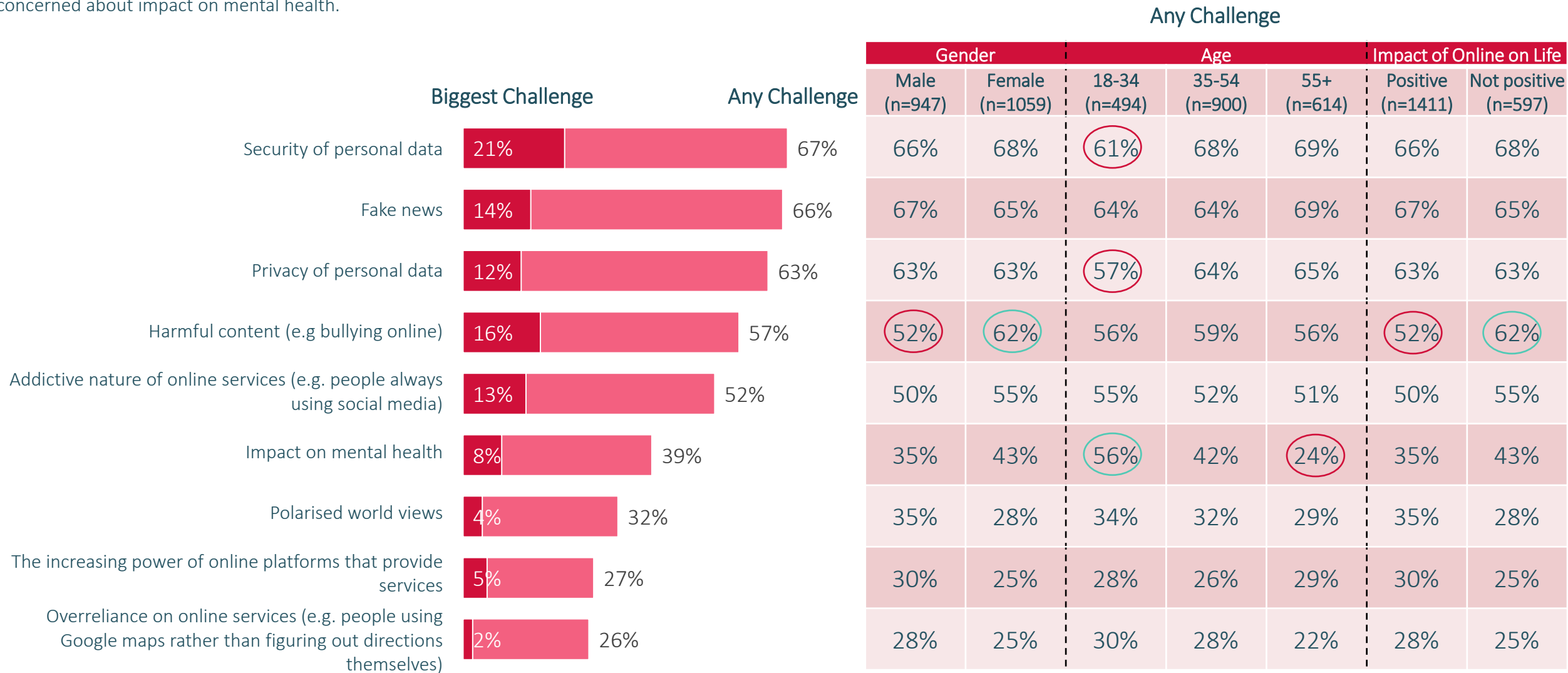
Those with dependent children are more likely to have become more conscious than those without (72% vs 65%, respectively).



Please read through the list and state which, if any, you think are challenges?

Security of personal data is endorsed as biggest challenge online

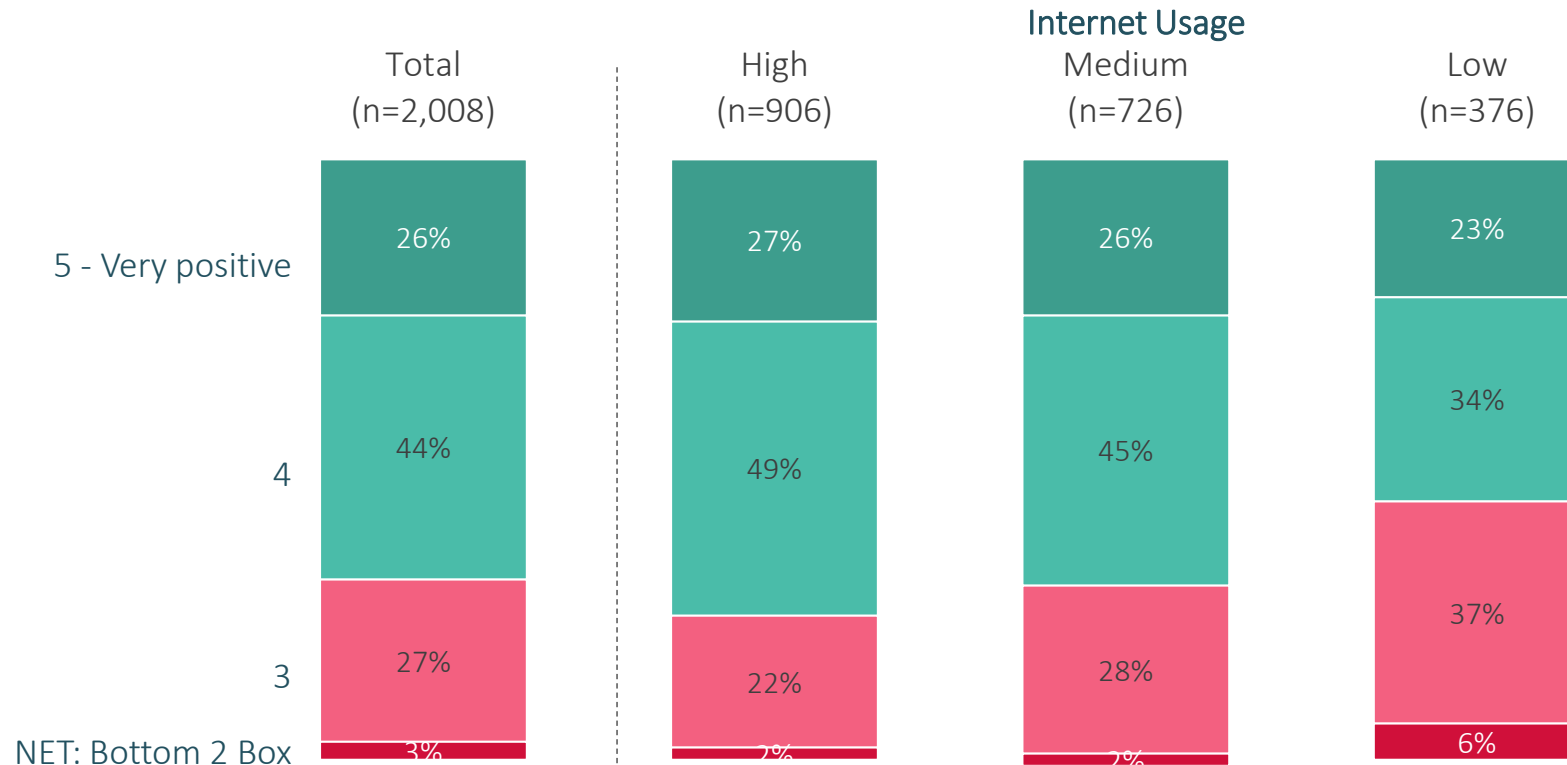
Fake news, data privacy, addictiveness and harmful content are all secondary challenges. Under 35s tend to be less concerned about their personal data than average and more concerned about impact on mental health.



Would you say the overall impact of online services on your life has been positive or negative?

70% report impact of online services has been positive

Those who are more engaged with using internet are more likely to report positive impact (76%) but low negativity even among Low Internet Users, at only 6% scoring bottom 2 box.



High Internet usage = Daily+ for at least 6 services*

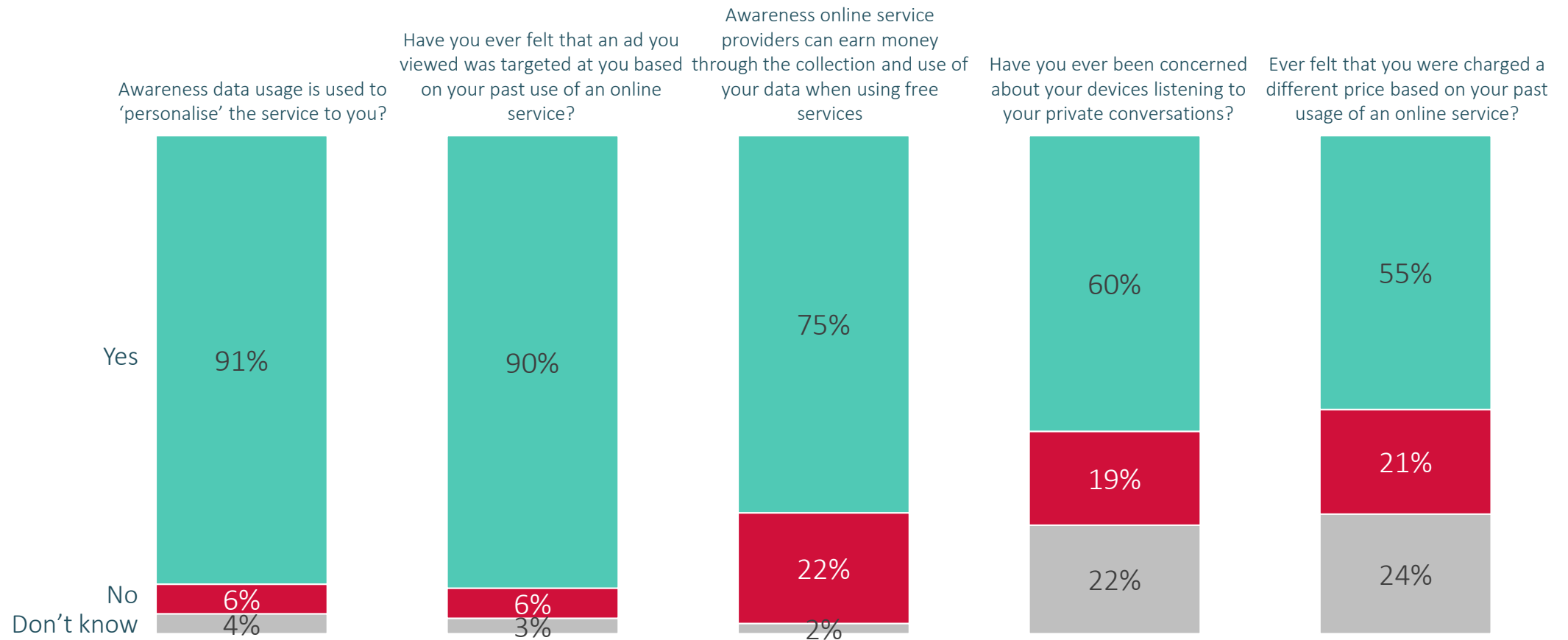
Medium internet usage = Daily+ for less than 6 services and Weekly+ for at least 6 services*

Low internet usage = Not weekly+ for 6 services*

*= Excluding email/remote working

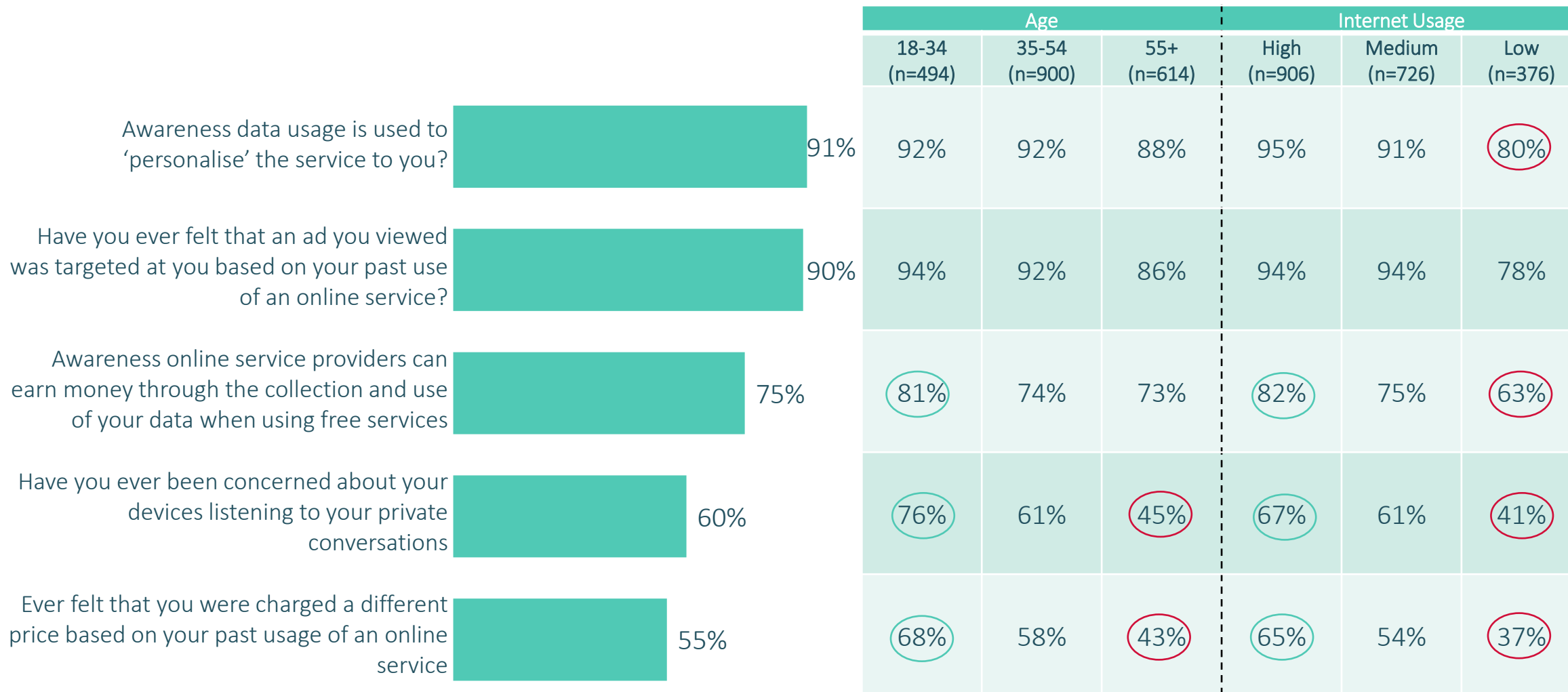
Very high awareness of services being personalised

90% have felt they have received a targeted ad due to online usage. Approx. 1 in 5 are unaware of service providers monetising data, similar number are concerned about device listening or differential pricing.



Younger and high internet users tend to have higher awareness

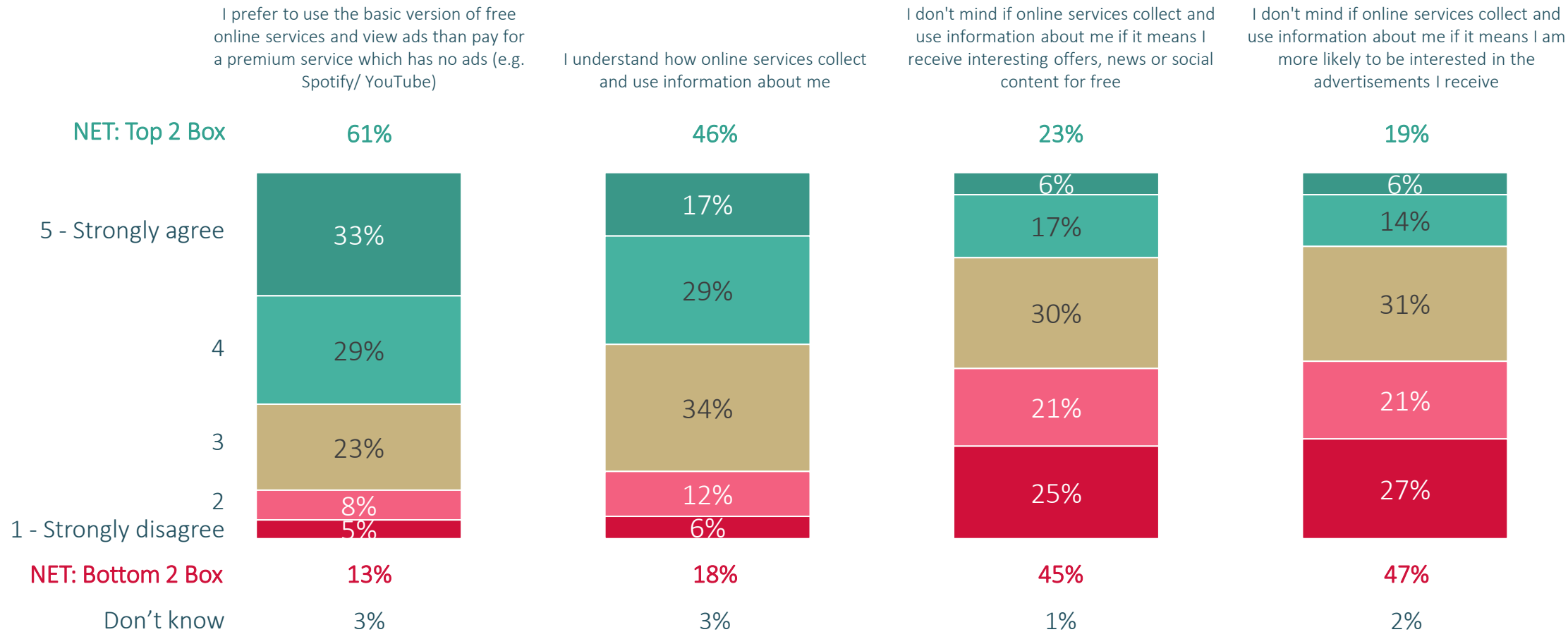
Older and low level users of online services are less likely to be aware of or concerned about monetisation of data, devices potentially listening to conversations and/or being charged a different price based on past usage.



Please read the following statements in relation to collection and use of online services. For each statement please answer to what extent you agree or disagree.

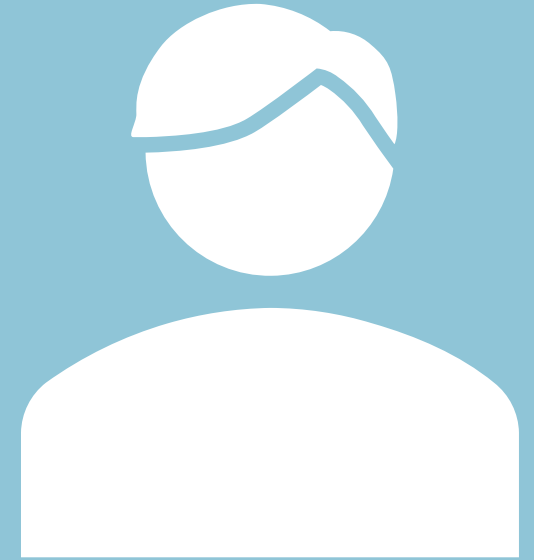
61% prefer basic free services with ads instead of paying to avoid ads

However, only 23% agree that they don't mind if online services collect and use information about them in order to receive interesting offers, news or social content for free.



4

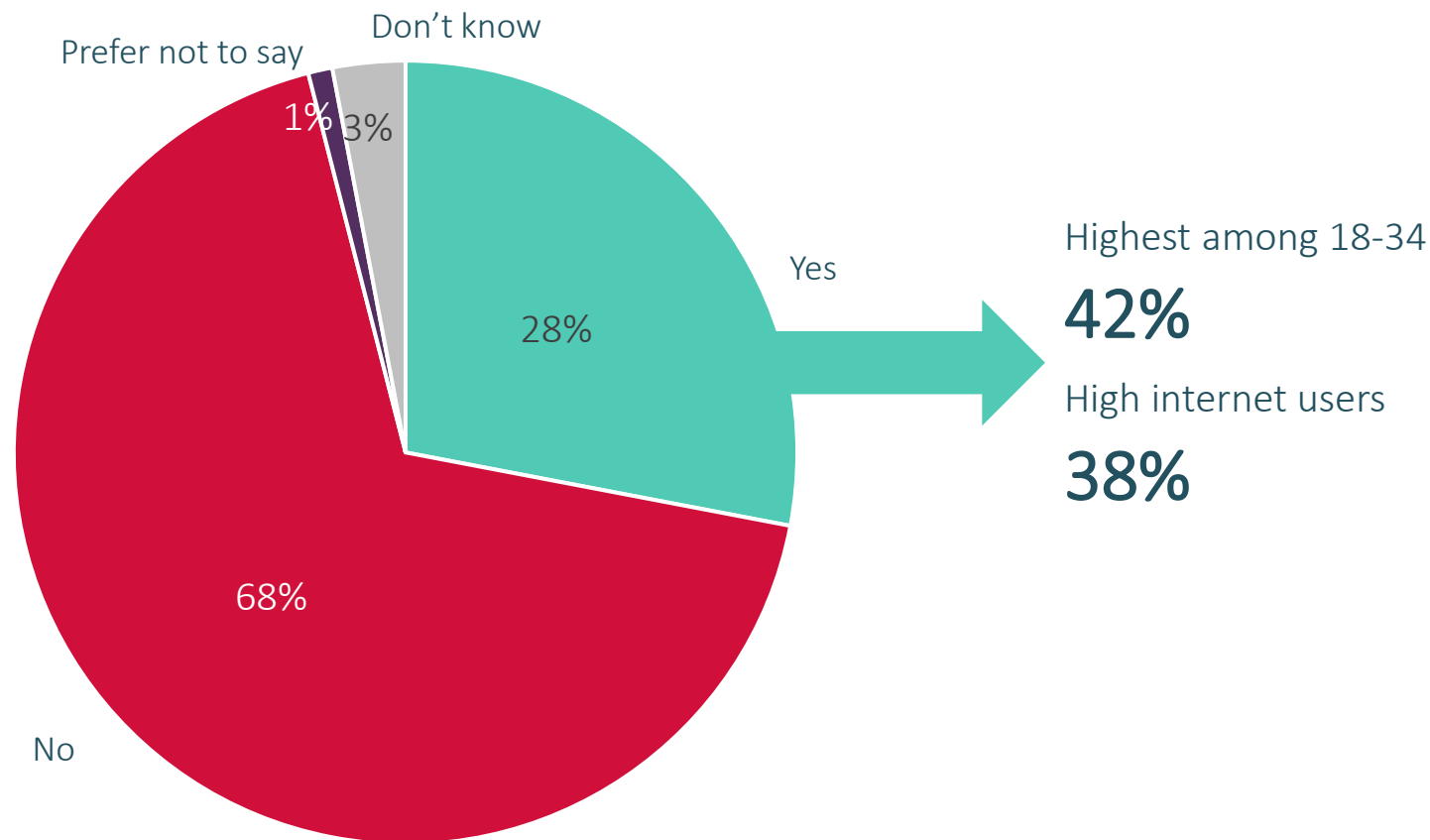
Online Safety - Adults



In the last year, have you used the internet to talk or chat to someone you don't know?

28% have 'chatted' online to a stranger in past year

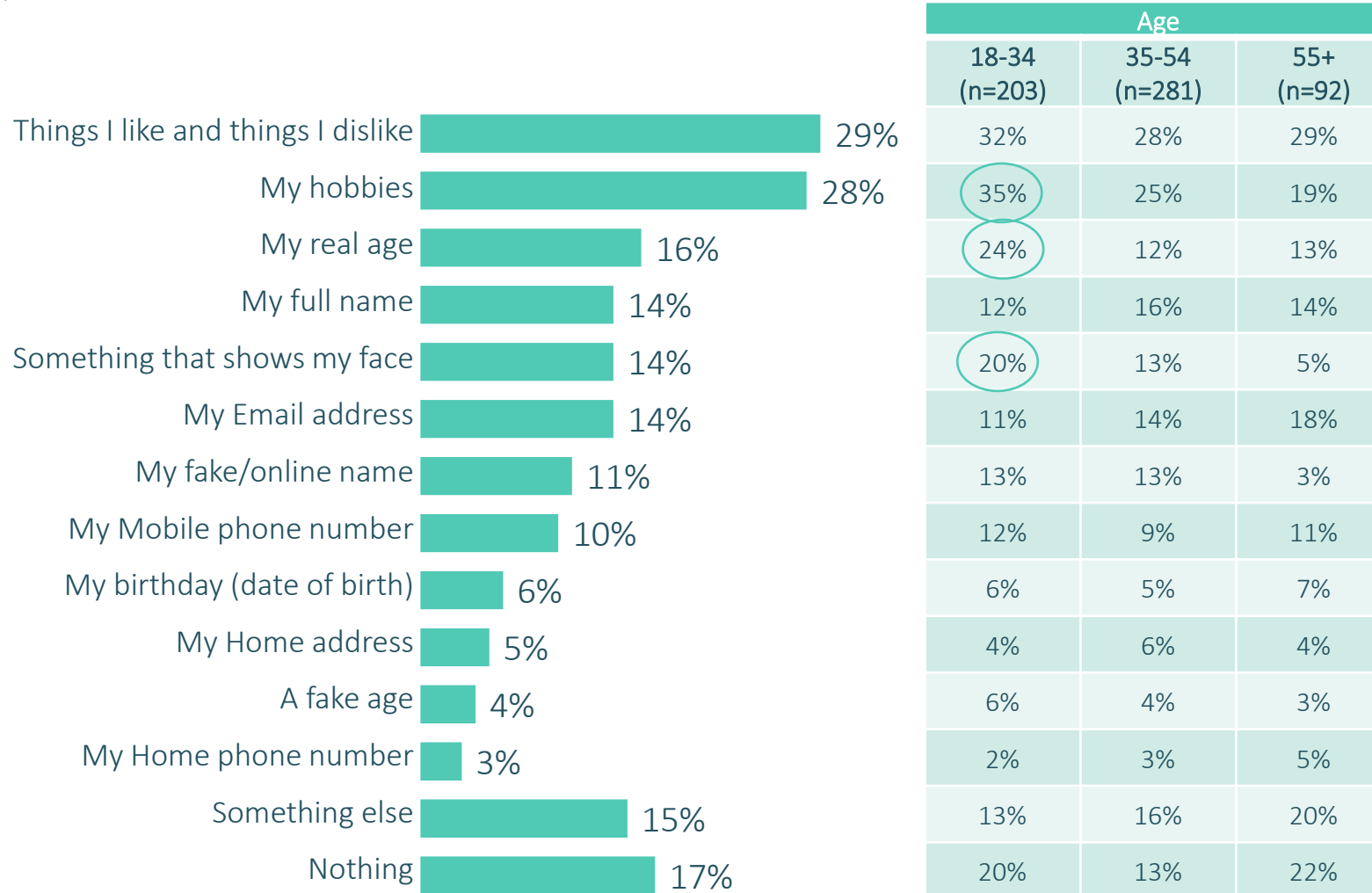
Those aged under 35 are most likely to have done so, as well as high internet users.



You said that you have used the internet to talk or chat to someone you don't know. What did you tell them?

Like, dislikes and hobbies most likely to be shared with strangers

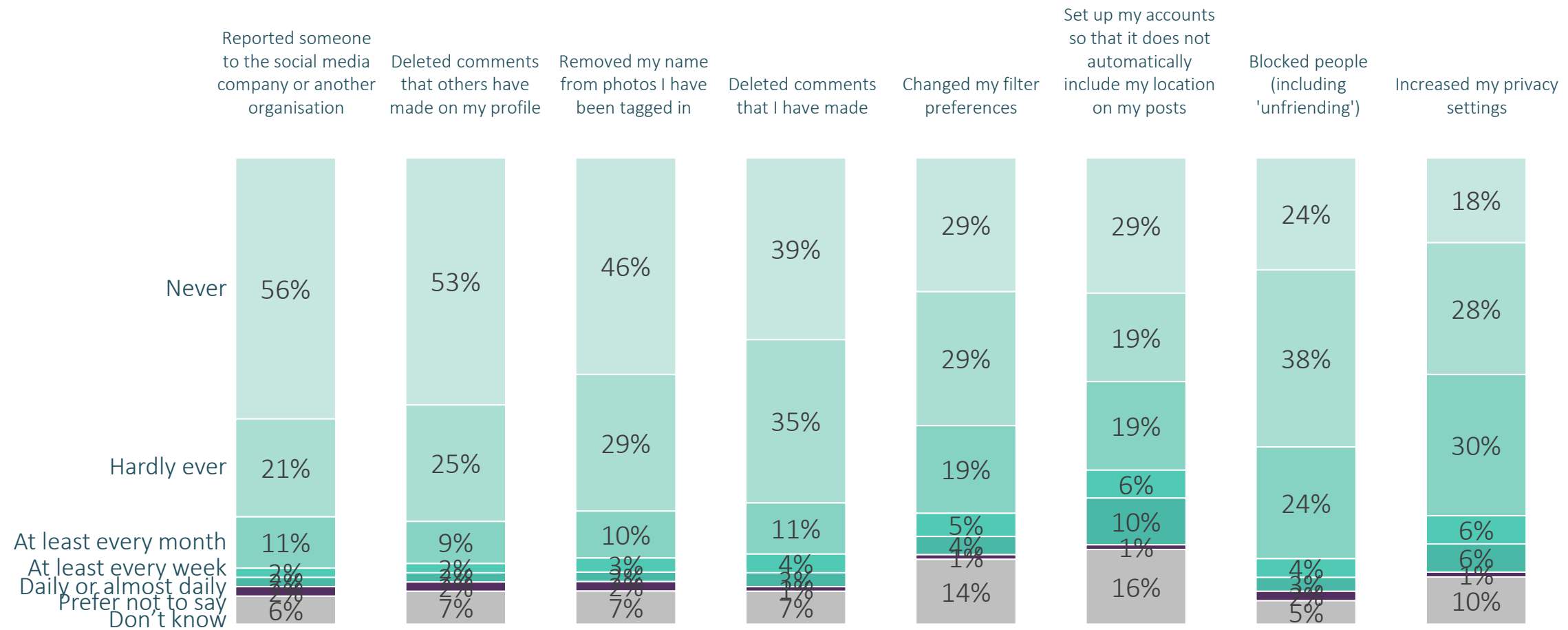
Those aged under 35 most likely to have shared their hobbies, real age and their face. 14% have given their full name, 10% have given their mobile phone number and 5% have provided their home address.



In the last year, when using social media, have you done any of these things to help keep you safe online?

Reporting someone or deleting comments is least likely

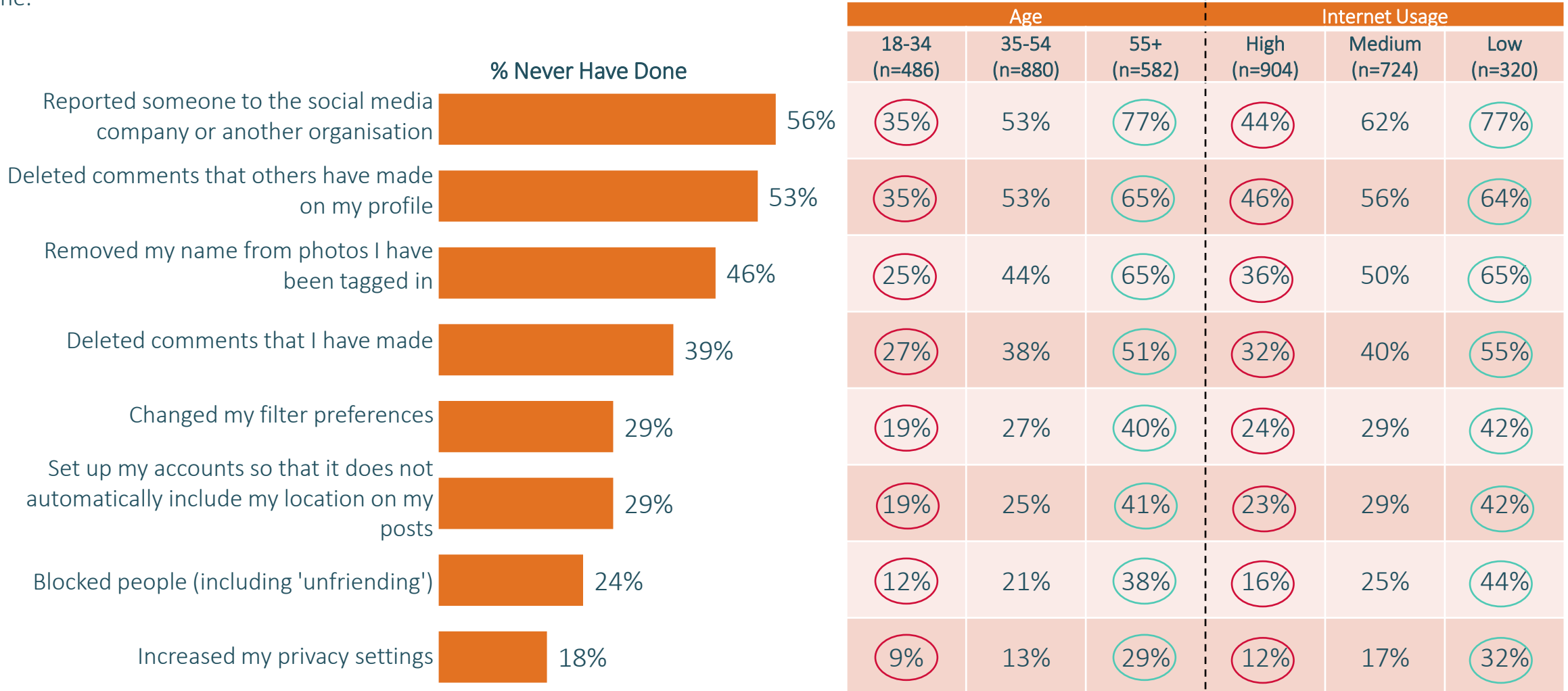
However, 71% have at least once in the past year blocked someone and 72% have increased their privacy settings.



In the last year, when using social media, have you done any of these things to help keep you safe online?

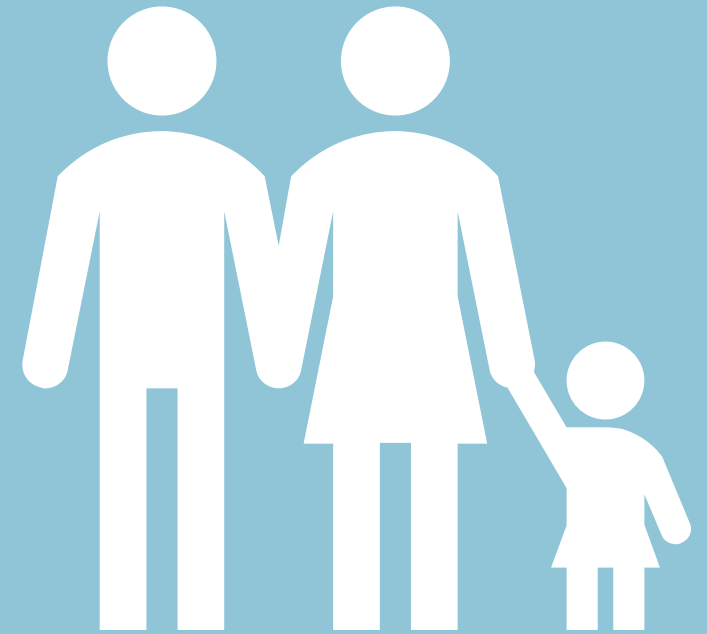
Older and Low users more prone to inertia in terms of online safety

On the other hand those aged under 35 and to a lesser extent High users are less like to say they have never done these things to help keep them safe online.



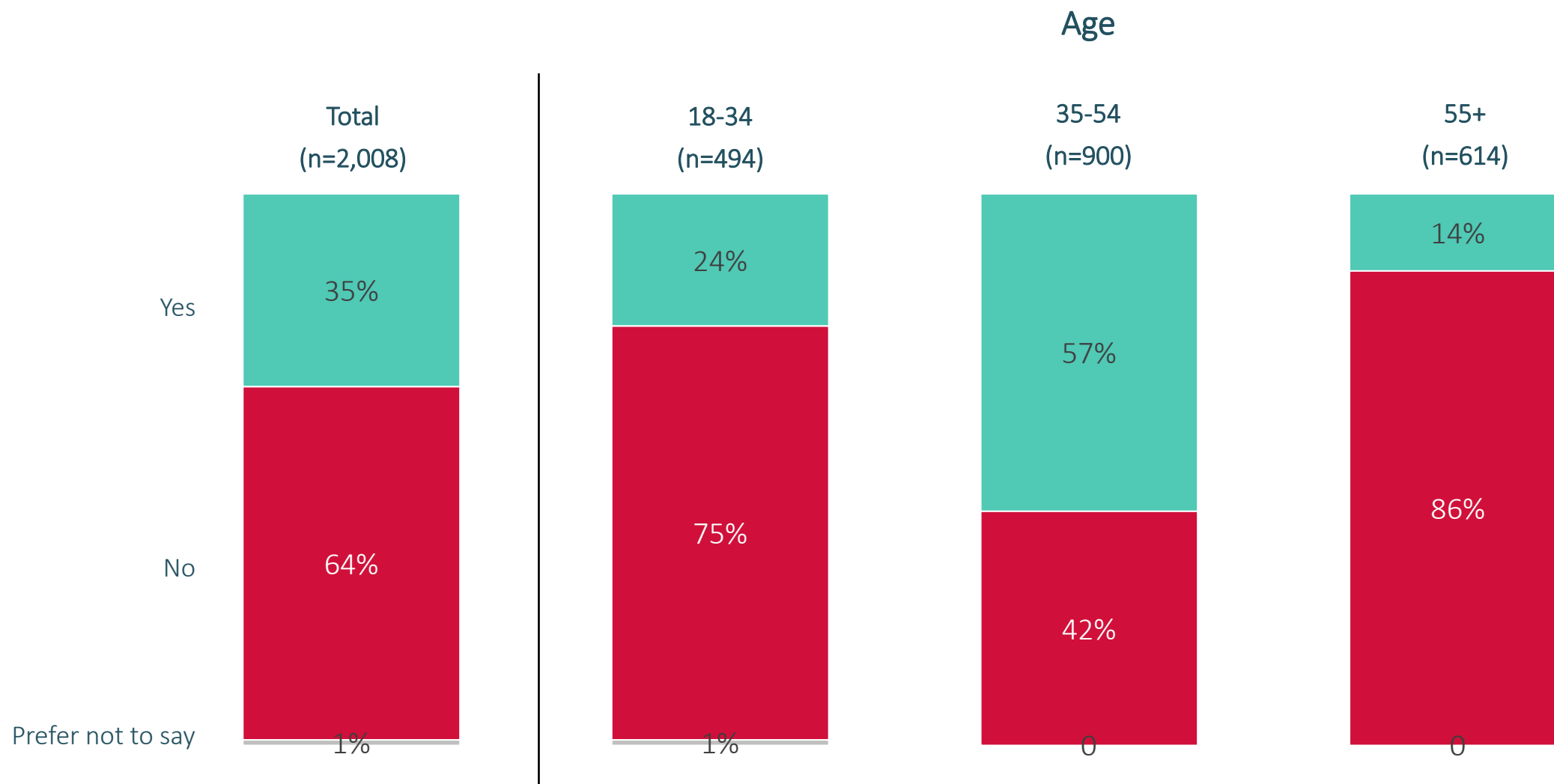
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Online Safety – Parents and Parental Control



Have you a dependent child or children in your household who uses the internet?

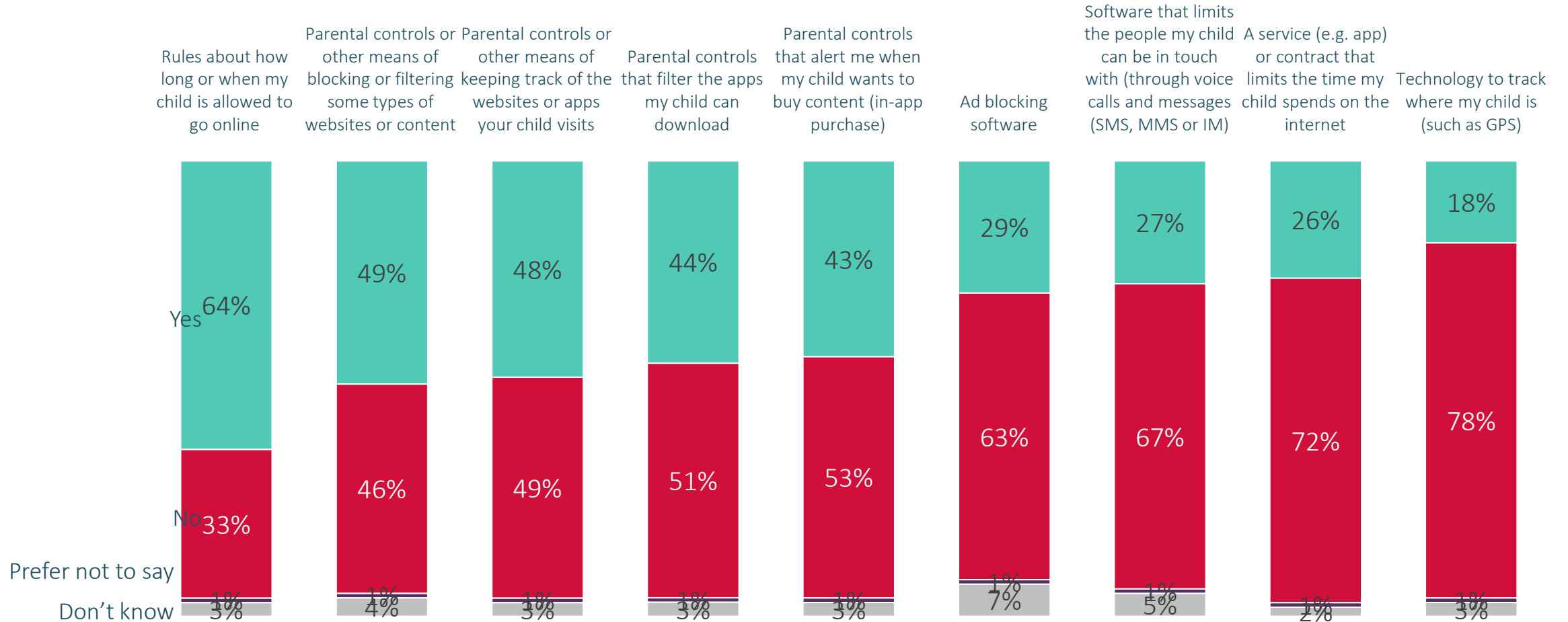
35% have a dependent child who uses the internet



Do you or other parent/carer make use of any of the following?

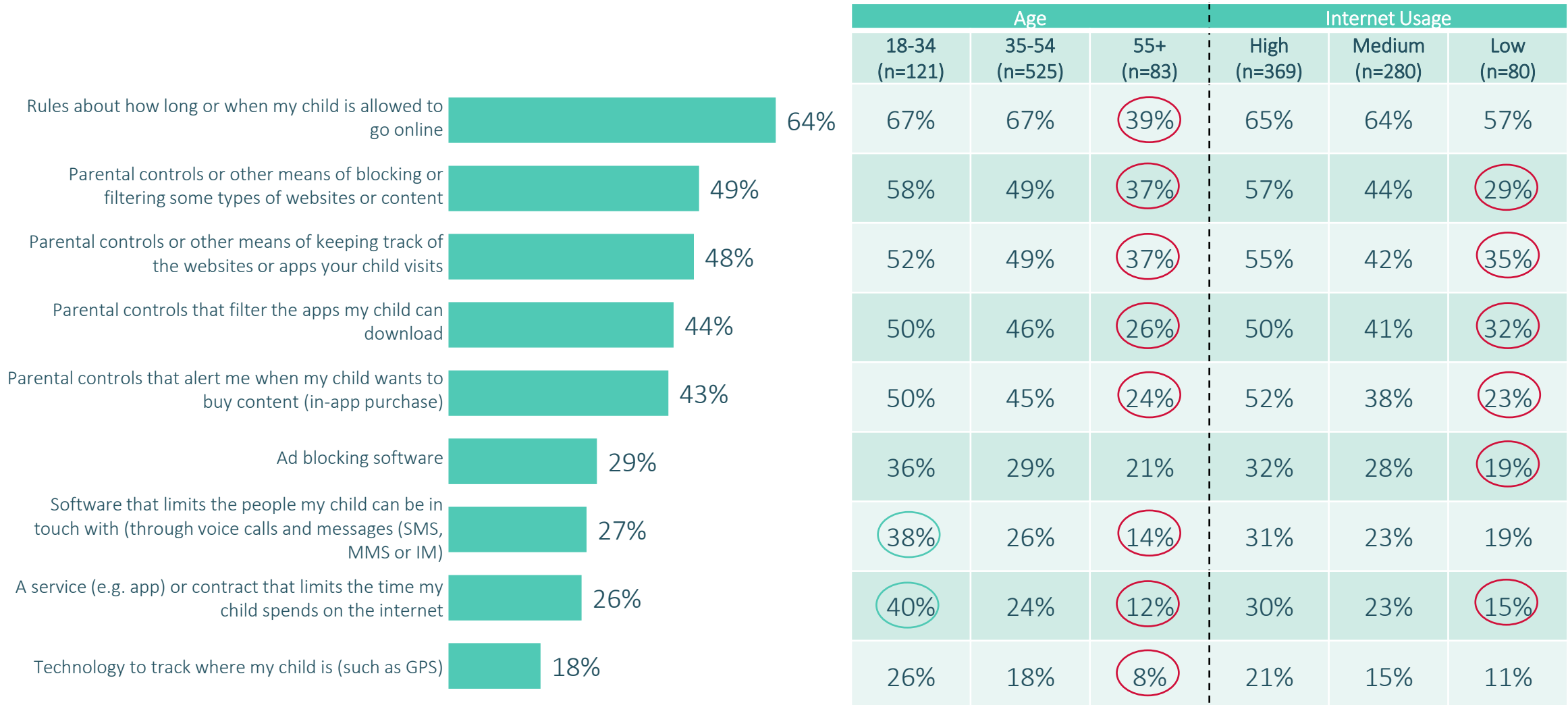
Rules about length of time online most common control employed

Just under half use parental controls or other means to block, filter or keep track of websites visited.



Do you or other parent/carer make use of any of the following?

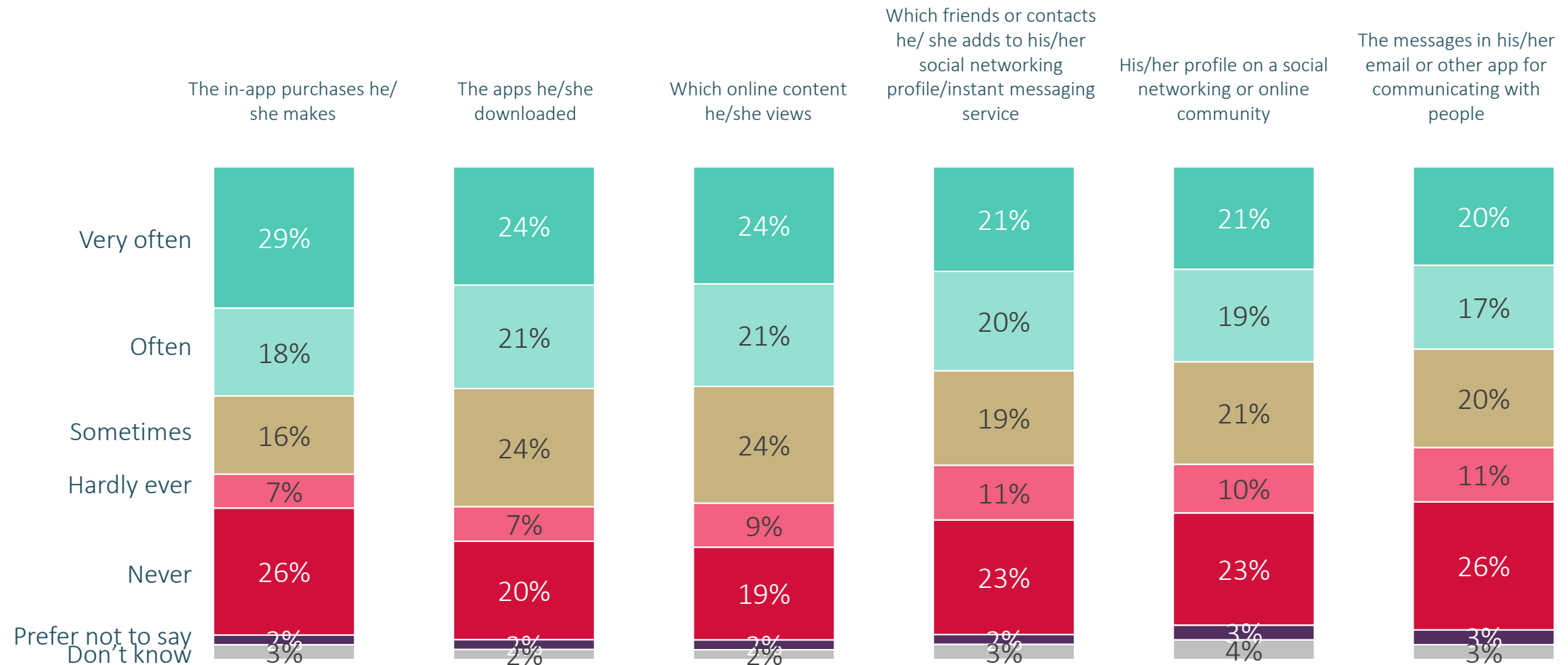
Older parents and low users less likely to control child's online usage



When your child/children use the internet, how often do you or other parent/carer check the following things afterwards?

Majority of parents check child's online behaviour at least sometimes

Communications with other people through email or other app is least likely to be checked with 37% saying they hardly ever or never check this after internet usage by their child.



Key Findings

1

On balance 70% of population believe online services have had a positive impact on their life. Communication platforms are most commonly used online service. There is also appreciation and usage for transactions based sites – online banking and similar that makes consumers lives easier.

2

2 in 3 more conscious of their privacy online. Security of personal data and fake news biggest concerns using online services. Over half unsure how online service providers collect and use information about them.

3

Majority are not regularly using controls available to keep themselves safe online. While many have increased privacy settings, the majority have never deleted comments made on their profile or reported someone to a social media company.

4

64% of parents have rules in relation to how long their child can spend online. A considerably smaller percentage of parents are using more advanced digital controls such as GPS tracking or software that limits who a child can contact.