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The Internet in Ireland: Patterns of consumer use, projections for future use, and implications for the public sphere

Introduction

Almost all the research published to date on Internet use in Ireland has been quantitative, and very sparse at that. This paper will review findings from three recent surveys - a CSO release (2001), Eurobarometer surveys (European Commission, 2001a, 2001b) and an MRBI survey commissioned by the Irish Information Society Commission in 2000, including the author's independent analysis of some of the data sets from the latter - to draw out patterns of current consumer use of the Internet, profiles of Internet users, and projections for future use, ending with implications for the public sphere in Ireland.

Current patterns of Internet use

2.1 Levels of use

A release from the Central Statistics Office (2001) based on surveys conducted in the fourth quarter of 2000 indicates that 262,700 Irish households had a computer connected to the Internet. This figure represents 20.4 percent of Irish households, up from 5 percent two years previously. In addition, 15,800 households had Internet access via the television (1.2%), 26,000 were connected through a WAP phone (2%) and 5,000 via a games console (0.4%).

The results of a Eurobarometer Survey on ICT and Working conducted in November 2000 have been cited in a European Commission working document (2001a) but have not yet been officially released by Eurobarometer. The working document contains two key statistics on Internet use in Ireland.

The first is actual Internet use. The Eurobarometer survey found that 25.2 percent of the Irish population was using the Internet, slightly less than the EU average of 25.7 percent. The top countries were Sweden at 61 percent, Denmark at 52.8 percent and the Netherlands at 50.1 percent.

The second relevant Eurobarometer statistic cited is Public Internet Access Points (PIAPs). Here, Ireland ranked second in the EU, with 0,16 PIAPs per 1000 inhabitants. Finland was first with 0,46 per thousand and Denmark was third with 0,15 per thousand.

2.2 Profile of users

In October 2000, the Irish Information Society Commission (ISC) published the most comprehensive survey to date of patterns of Internet and computer use by Irish adults.

The survey was conducted in June and July of that year by the MRBI, with a "nationally representative sample of 1408 adults aged 15+ years at 70 randomly-selected sampling points throughout the country." As a member of one of the ISC advisory groups, the author had input into the MRBI survey questions and was supplied by the ISC with some MRBI data sets to analyse independently for academic purposes.

The independent analysis of the MRBI data found three distinct categories of ICT users: a small group of early ICT adopters, a larger group of average ICT users, and the largest group - non-users.

Nine percent of the Irish adults surveyed were early adopters of the Internet or other ICTs. The hard core of this group had monthly household incomes more than IR£3000, were from the upper and middle classes, had a third-level education and were working in managerial and support positions. The wider group of early adopters also included a high number of students, members of the lower middle class, people living in Dublin and other urban areas, men, and those aged 15-49.

The second category - 43 percent of respondents - were more or less average users of the Internet or other ICTs. In this group were many people living outside Dublin, those with a leaving or group certification, those with monthly household incomes of IR£1,000 to IR£2,000, women, and members of the skilled working class.

Non-users were the largest category, with 48 percent of respondents not using the Internet or most other new ICTs. Many of the hard core non-users were people with no qualifications, unskilled workers, "housewives", the unemployed, those with monthly household incomes less than IR£1,000, and over-65s. The wider group of non-users included a disproportionate number of people over age 50, and farmers and other agricultural workers.

2.3 Reasons for using the Internet

The MRBI statistics include the following actual uses of the Internet by Irish Internet users in 2000 (and in 1999 and 1998 where available).

- Research - getting information: 66% (69% in 1999 and 1998)
- Sending or receiving email: 48% (51% in 1999 and 36% in 1998)
- Information on travel/leisure: 23% (22% in 1999 and 1998)
- Entertainment: 11% (17% in 1999 and 13% in 1998)
- Downloading/listening to music: 11%
- Participating in chat lines/making new friends: 9% (10% in 1999 and 9% in 1998)
- Reading magazines/newspapers online: 9% (13% in 1999 and 14% in 1998)
- Distance learning: 9%
- Online shopping/booking services: 8% (7% in 1999 and 5% in 1998)
- Job seeking: 5% (8% in 1999).

Future uses

The MRBI survey asked respondents about their interest in using Public Internet Access Points, and their future uses of the Internet at home. It would be misleading to suggest that respondents will actually follow through with their projections but the data do indicate something important about future trends.

3.1 Interest in using Public Internet Access Points (PIAPs)

The MRBI survey found that 39 percent of Irish adults were interested in using Public Internet Access Points; the most popular PIAPs were libraries and cybercafes. However the profile of those interested was strongly imbalanced in educational background and income. Fifty-three percent of respondents with any third level education were interested in using PIAPs, compared to 42 percent of those with a group or leaving cert and 22 percent of those with no qualifications. Fifty-two percent of respondents with monthly household incomes more than IR£3000 were interested in PIAPs, compared to 25 percent of respondents with monthly household incomes of less than IR£1,000.

3.2 Reasons for using the Internet in the future

The MRBI statistics include the reported future uses of the Internet by all adults in Ireland. Percentages below refer to adults who reported they were interested in each particular use.

- Educational purposes for self-children: 69%
- Email: 60%
- Accessing information from around the world: 60%
- Taking courses in distance education: 47%
- Accessing public services or voting: 46%
- Participating in online discussions: 40%
- Putting up a Web page: 31%
- Participating in policy-making online: 24%

3.3 Reasons for future use and socio-economic profile (a)

The MRBI data sets allowed a basic socio-economic analysis on four indicators: employment status, class, gender and place of residence.

Employment status: The employment status of the respondents was the most significant socio-economic indicator regarding future uses of the Internet. Those respondents who were not working were significantly less interested in all future uses of the Internet, and especially so for email and accessing information from around the world. Respondents who were working were significantly more interested in using it for public services and voting.

Class: Class was also a highly significant socio-economic indicator. Respondents from the upper middle class were significantly more interested than the average for all future

uses of the Internet, particularly for email, educational purposes, accessing information from around the world, accessing public services and voting, and putting up Web pages.

Those from the lower middle class were more interested than the average for all future uses of the Internet, and significantly so for using it for email, accessing information from around the world, distance education, and accessing public services and voting.

Respondents from the skilled working class were more interested than the average in using the Internet for distance education and less interested in the average in using it for accessing public services and voting, and putting up a Web page.

Respondents from the unskilled working class were significantly less interested in the average for all uses of the Internet, and especially so for email, accessing information from around the world, accessing public services and voting, distance education and educational purposes.

Gender: There was no significant gender difference. Both women and men respondents had similar interests for future Internet use, although women were slightly more interested than men in using it for distance education.

Location of residence: There was no significant difference between urban and rural respondents regarding future Internet use, although rural dwellers were slightly less interested in using it for educational purposes and for email.

3.4 Reasons for future use and socio-economic profile (b)

Each different use of the Internet was also analysed, again by employment status, class, gender and place of residence. Each was highly imbalanced; the four "most imbalanced" future uses of the Internet are below.

Email: Surprisingly, for this author at least, the analysis found that reported future use of email had the most imbalanced user profile. The most significant indicators were employment status and class. The upper and lower middle classes indicated a significantly higher than average interest in future email use, with those not working and unskilled workers having a significantly lower than average interest.

Accessing information from around the world: This preferred future use of the Internet had the second most imbalanced user profile. Again, the most significant indicators were employment status and class, with respondents from the upper middle class having the highest interest and those not working and unskilled workers having the lowest interest.

Educational purposes for self-children: This had the third most imbalanced user profile, again with the indicators being upper middle class for above average interest and those not working for below average interest.

Accessing public services or voting: This future use of the Internet had the fourth most imbalanced user profile, again with the upper middle class most interested in this use of the Internet and those not working and the unskilled working class least interested.

Patterns of news consumption

The latest Eurobarometer survey (European Commission, 2001b) contains the most recent data on patterns of news consumption in Ireland (late 2000). The survey covered television, newspaper and radio.

Television news: 65 percent of respondents in Ireland said they watched the news on television everyday. This was lower than the EU average of 71 percent. The highest countries were Italy (83%) and Finland (80%).

News on radio: 61 percent of respondents in Ireland said they listened to the news on radio every day, which was the third highest level among countries in Europe. The EU average was 40 percent. Austria and Denmark were higher at 67 percent.

News in daily papers: 45 percent of respondents in Ireland said they read the news in daily papers everyday, which was higher than the EU average of 42 percent. The highest countries were Sweden (70%) and Finland (68%).

Another indicative question from the Eurobarometer survey was the preferred method for receiving information on the European Union. The preferences of respondents in Ireland are below, followed by the EU average for that preference.

Television, 43 percent (EU 59%)
Daily newspapers, 33 percent (EU 34%)
Radio, 28 percent (EU 24%)
Internet, 9 percent (EU 11%)
Other press, 9 percent (EU 11%)
Does not want EU info, 7 percent (EU 6%)

Irish Internet use and the public sphere

By 'the public sphere' we mean first of all a realm of our social life in which something approaching public opinion can be formed. Access is guaranteed to all citizens. A portion of the public sphere comes into being in every conversation in which private individuals assemble to form a public body... Citizens behave as a public body when they confer in an unrestricted fashion - that is, with the guarantee of freedom of assembly and association and the freedom to express and publish their opinions - about matters of general interest. In a large public body, this kind of communication requires specific means for transmitting information and influencing those who receive it. Today [1964]

newspapers and magazines, radio and television are the media of the public sphere (Habermas, 1964 as cited in Sparks, 1998:110).

Many discussions and debates have been held about Habermas' vision of the public sphere, the Internet and the public sphere, and multiple public spheres (including for example O'Donnell, 2001). For the purposes of our paper, we can safely say that the ideal public sphere includes at least four central elements: universal access, a place where opinions are formed, public access to information and the media, and provision of information by citizens for citizens; this latter element is the one most often highlighted as the contribution of the Internet to the public sphere.

5.1 Universal access

To briefly summarise the data introduced earlier, 20 percent of Irish households have a computer connected to the Internet, up from 5 percent two years previously. When access from work and other places is considered, about 25 percent of the Irish population is using the Internet, slightly less than the EU average.

Analysis of the user profile found that Internet users have higher household incomes, are from more privileged classes, and have more educational qualifications; as well more men than women are using the Internet. Seventy-five percent of people in Ireland are not using the Internet and the core of the non-users are those not working, "housewives", those on lower-than-average household incomes, older people, and farmers and other agricultural workers.

Ireland has a much higher percentage of Public Internet Access Points than the EU average. However those interested in using the PIAPs have higher incomes and educational qualifications, suggesting that many PIAP users already have Internet access at home.

These figures quite obviously indicate that the Internet is still an elite technology with a user profile very uneven by key socio-economic indicators. They also suggest that the Internet penetration rates in Sweden of more than 60 percent of the population will not be matched in Ireland in the near future. None of the surveys suggest that Internet penetration in Ireland will be as universal as that for television or telephony (and recent developments in broadband Internet in Ireland and mobile Internet in Europe also do not suggest that these will be commonly used for Internet access in the near future.)

5.2 A place where opinions are formed

The Internet's persistent elite status and imbalanced user profile in Ireland have implications for its capacity as a place for opinion-formation. In public internet fora in Ireland, for example the Online.ie discussions, the opinions and ideas exchanged will represent and reinforce the views of the more privileged members of the population. Class was most significant in the analysis of future participation in online discussion, with respondents from the upper middle class most interested in this activity.

5.3 Public access to information and the media

The Eurobarometer data indicate that people in Ireland access the news daily through television (65%), radio (61%) and daily papers (45%). The only data from the surveys relating to Internet use for media access is the MRBI statistic that nine percent of current Internet users in Ireland use it for reading magazines/newspapers online. This figure is down from 13 percent in 1999 and 14 percent in 1998.

Almost two-thirds of Irish Internet users use it for research/getting information (down slightly from previous years); when a particular type of information was specified it was travel and leisure (23%) and online shopping/booking services (at 8%, up from previous years). Information for job seeking was down from previous years.

The question on future Internet use indicated that information seeking was a strong interest, especially for educational purposes, obtaining information from around the world, and accessing public services and voting. However, interest in information on the Internet was overwhelmingly from respondents from the upper middle class.

Only nine percent of current Internet users in Ireland used it for distance learning but 47 percent of respondents said they were interested in future Internet use for this purpose. Both upper middle class and lower middle class were equally interested in distance education, and as mentioned earlier, women were slightly more interested than men.

In summary, among the types of Internet information specified by users, travel, leisure and entertainment information are the most common; news consumption on the Internet is not as popular among Irish users. Television, radio and daily newspapers are by far the preferred sources of news.

5.4 Information by citizens for citizens

Forty-eight percent of current Internet users are using it for email exchange, and Internet use for email was strong in the future projections. However as noted, email exchange had the most imbalanced profile of interested respondents - it was of more interest by far to those from the upper middle class.

Almost a third of the MRBI respondents were interested in using the Internet to put up a Web page, and again, the most interested users were those from the upper middle class. No data is available on how many people in Ireland have actually put up their own Web page.

Conclusions

This review of Irish Internet use draws from the most comprehensive survey data currently available. It is possible that more extensive surveys of Internet use in Ireland have been conducted as market research by private bodies but have not been made public. Therefore a remarkable aspect of this review and analysis is the fact that so little

information exists; trying to squeeze meaningful information about patterns of Internet use from these survey sources is a frustrating experience.

The report from the DCU project, *The Voluntary Sector in the Information Age* (O'Donnell, Trench and Ennals, 1998) remains one of the most extensive studies of patterns of Internet use in Ireland, which also remarkable because it was conducted during a time of low Internet use in the community and voluntary sector and therefore focused its analysis on the many restraints and barriers to computer and Internet use rather than how the Internet was used.

Turning to international studies, Aurigi and Graham (1998), and Calabrese and Borchert (1996) who have analysed patterns of Internet use in, respectively, Britain and Europe, and the US, see three distinct groups emerging regarding relationships to the Internet public sphere: a small "transnational corporate class," highly mobile and relying upon interactive global computer networks to operate, and using the Internet to live where they chose while remaining connected to the economic mainstream; a larger group of less mobile and less affluent workers using the Internet largely for passive consumption; and a distinct group comprised of the marginalised groups living in poverty and structural unemployment excluded altogether from Internet public spaces.

We can say from this review of survey data that the picture in Ireland is more complex and multilayered and somewhat less pessimistic. The Internet does present many new options for communications, and for information and media consumption and production. However it is clear that Internet use is strongly shaped by social and structural relations; there is little to suggest from the latest research that Internet use will shift existing patterns of communication, media consumption, and social relations in the Irish public sphere in the foreseeable future.

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