IPSOS B&A TECHSCAPE 2025

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25-048080

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TABLE OF CONTENTS

INTRODUCTION

Introduction

TechScape is conducted on our face-to-face CAPI Omnibus amongst a fully representative sample of 1,000 adults aged 16+ years.

The sample is stratified by age within gender by town size across 63 sampling points nationwide. An overall socio-economic status quota is also applied.

The fieldwork for this study was conducted during June 2025.

In addition, we delved deeper into the world of AI via our global Ipsos AI Monitor.

AI Monitor methodology

These are the results of a 30-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday, March 21, and Friday, April 4, 2025. For this survey, Ipsos interviewed a total of 23,216 adults aged 18 years and older in India, 18-74 in Canada, Republic of Ireland, Malaysia, South Africa, Türkiye, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample consists of approximately 2,000 individuals in Japan, 1,000 individuals each in Australia, Belgium, Brazil, Canada, France, Germany, Great Britain, Italy, Spain, and the U.S., and 500 individuals each in Argentina, Chile, Colombia, Hungary, Indonesia, Ireland, Malaysia, Mexico, the Netherlands, Peru, Poland, Singapore, South Africa, South Korea, Sweden, Switzerland, Thailand, and Türkiye. The sample in India consists of approximately 2,200 individuals, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online.

Samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, Switzerland, and the U.S. can be considered representative of their general adult populations under the age of 75. Samples in Brazil, Chile, Colombia, Indonesia, Ireland, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand, and Türkiye are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more “connected” segment of their population.

India’s sample represents a large subset of its urban population — social economic classes A, B and C in metros and tier 1-3 town classes across all four zones.

The data is weighted so that the composition of each country’s sample best reflects the demographic profile of the adult population according to the most recent census data.

“The 30-country average” reflects the average result for all the countries and markets in which the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

When percentages do not sum up to 100 or the ‘difference’ appears to be +/-1 percentage point more/less than the actual result, this may be due to rounding, multiple responses, or the exclusion of “don't know” or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll where N=1,000 being accurate to +/- 3.5 percentage points and of where N=500 being accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

A note on the generational definitions used in TechScape

The definitions and size of prize of each have been detailed below:

GenZ

Born 1996 – 2012
Age 16 – 28

20%

829,000

Millennials

Born 1980-1995
Age 29 - 45

31%

1,278,000

Gen X

Born 1966-1979
Age 46-59

22%

927,000

Baby Boomers

Born 1945-1965
Age 60-80

24%

988,000

Silent Gen

Born 1944+
Age ≥80

3%

103,000

In order to gain deeper insight into the tech habits of Irish consumers, **demographic analysis** has been conducted on the findings from this year's TechScape. We have also included five different generations.

'000s & %s = their proportion in the population aged 16+ years

Demographic breakdown of the Generations

It is important we understand the developed lifestage and age (and overlap) of the 'Generation' jargon – Millennials are firmly in the early family stage, while Gen X are beginning to move past this stage





	Total pop	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
Pop.	**4,125,000**	**829,000**	**1,2780,000**	**927,000**	**988,000**	**103,000**
Base:	*1,005*	*154*	*316*	*228*	*278*	*29*
Gender:						
Male	49%	51%	48%	48%	50%	51%
Female	51%	49%	52%	52%	50%	49%
Age:						
16-24	14%	🟩 71%	-	-	-	-
25-34	15%	🟩 29%	🟩 31%	-	-	-
35-49	29%	-	🟩 69%	34%	-	-
50-64	22%	-	-	🟩 66%	🟩 30%	-
65+	19%	-	-	-	🟩 70%	🟩 100%
Lifestage:						
Single	39%	🟩 77%	🟥 19%	🟥 24%	42%	🟩 73%
Pre Family	6%	10%	🟩 13%	-	-	-
Family Pre School	13%	🟥 8%	🟩 34%	🟥 4%	-	-
Family Pre Teen	14%	🟥 4%	🟩 29%	18%	-	-
Family Teen	6%	🟥 1%	4%	🟩 20%	1%	
Empty Nester	22%	-	2%	🟩 33%	🟩 57%	27%

🟥 Significantly lower
🟩 Significantly higher

KEY THEMES

Preface

We are living in a period where digital technology has ascended to the same level of necessity as electricity, acting as the very current that energises our modern existence. It seamlessly integrates into our daily activities and underpins the bedrock of business, innovation, and interpersonal connection. However, it is crucial to maintain a realistic perspective on the digital landscape.

Despite the historic rapidity of hardware innovations that visibly transformed our lives annually, this era seems to be transitioning into maturity. Notably, while the velocity of device adoption is plateauing in certain sectors, a profound transformation is unfolding beneath the surface: the rise in digital fluency among all demographic groups. Our Ipsos B&A TechScape 2025 study highlights that the proportion of adults over 65 using the internet daily is climbing, emphasising not just usage but mastery, presenting significant opportunities. As of 2025, 58% of those aged 65 and over are online more than once a day, although they show less enthusiasm for acquiring new gadgets.

Artificial Intelligence (AI) currently dominates the headlines as the prevailing buzzword, yet media portrayals often oversimplify its potential and current impact. The reality is more complex: AI is still in its nascent stages. Despite notable progress in professional services, the data indicates that the majority of businesses have yet to fully embrace AI. In Ireland, public apprehension about AI remains high, with only 22% of the population using AI tools like ChatGPT, primarily among middle-class Dubliners, Gen Z, and Millennials. This is notably lower than global levels, revealing significant nervousness towards AI.

The true challenge lies not in merely implementing AI tools, but in rethinking organisational processes, customer engagement, and core value propositions. It is imperative to understand and manage implications related to quality, bias, and the risk of yielding uninspired, 'vanilla' outcomes. We must ask ourselves: is this outcome acceptable?

Beyond immediate business consequences, AI's implications stretch into broader societal realms, poised to redefine employment and reshape human cognition. Our conversations must pivot from the fear of job displacement to job augmentation, creating new roles that harness critical human abilities—such as critical thinking, creativity, and emotional intelligence. Meanwhile, we must remain vigilant about the risk of "cognitive offloading," where excessive reliance on AI could diminish essential critical-thinking capacities.

The Ipsos B&A TechScape 2025 report illustrates this is the new frontier. It demands a precise vision, a readiness to experiment and learn, and a deep commitment to bringing everyone along on this journey. The future is not something that merely happens to us; it is something that we actively construct. The task ahead is clear: we need to get to work on building a future where technology and human (HI and AI) potential advance hand in hand.

Luke Reaper, CEO (Ireland) Ipsos B&A

Key themes

1. Stagnation in device ownership

- No notable shifts in device ownership.
- Smart TVs and Laptops up slightly since 2024, but not returning to 2023 levels
- "Connected home" devices seeing decreases ownership.

2. Older cohorts catching up on internet usage

- Silent Gen in particular showing signs of increased activity online
- 19% now shopping online
- 11% now following celebrities or influencers online, up significantly since 2024 (2%)

3. Working from Home trending upward

- 26% of respondents work from home 2+ days per week, up 8% since 2024.
- 46% of workers work from home 2 or more days per week, with 53% working from home in any capacity.

4. Tech concerns high among Millennials and Gen X

- Gen X respondents showing higher concern around data privacy online (67%) and how organisations may use the data (76%).
- Millennials showing similar, with 64% concerned generally and 74% about organisation use

5. Plateau in digital finance

- Stagnation in adoption of digital finance.
- 49% use digital banking apps, no change since 2024
- 49% use contactless payments, no change since 2024
- No growth in adoption of cryptocurrency

6. Growth in popularity for on demand, free entertainment

- YouTube used by 76% of respondents
- Listening to podcasts increased to 45% of people, from 40% in 2024
- Decline in live events and sports since 2024, from 37% to 30%

7. Concern surrounding AI persisting in Ireland

- Half do not trust AI to protect personal data.
- 43% trust AI not to discriminate, compared to 46% trusting people
- 77% believe AI must be regulated; 66% fear ChatGPT's impact on students

8. Below average understanding of AI in Ireland

- 64% feel they have a good understanding of AI, 28% do not.
- Globally Ireland ranks 22nd in this regard, 3 points behind the global average
- 64% of Irish people feel nervous when a product or service uses AI

9. Some progress in adoption of AI

- Chat GPT has seen an increase in adoption, from 16% in 2024 to 22% now.
- This change primarily driven by Gen Z, with 37% using (+11%), and Millennials, with 30% now using (+8%)

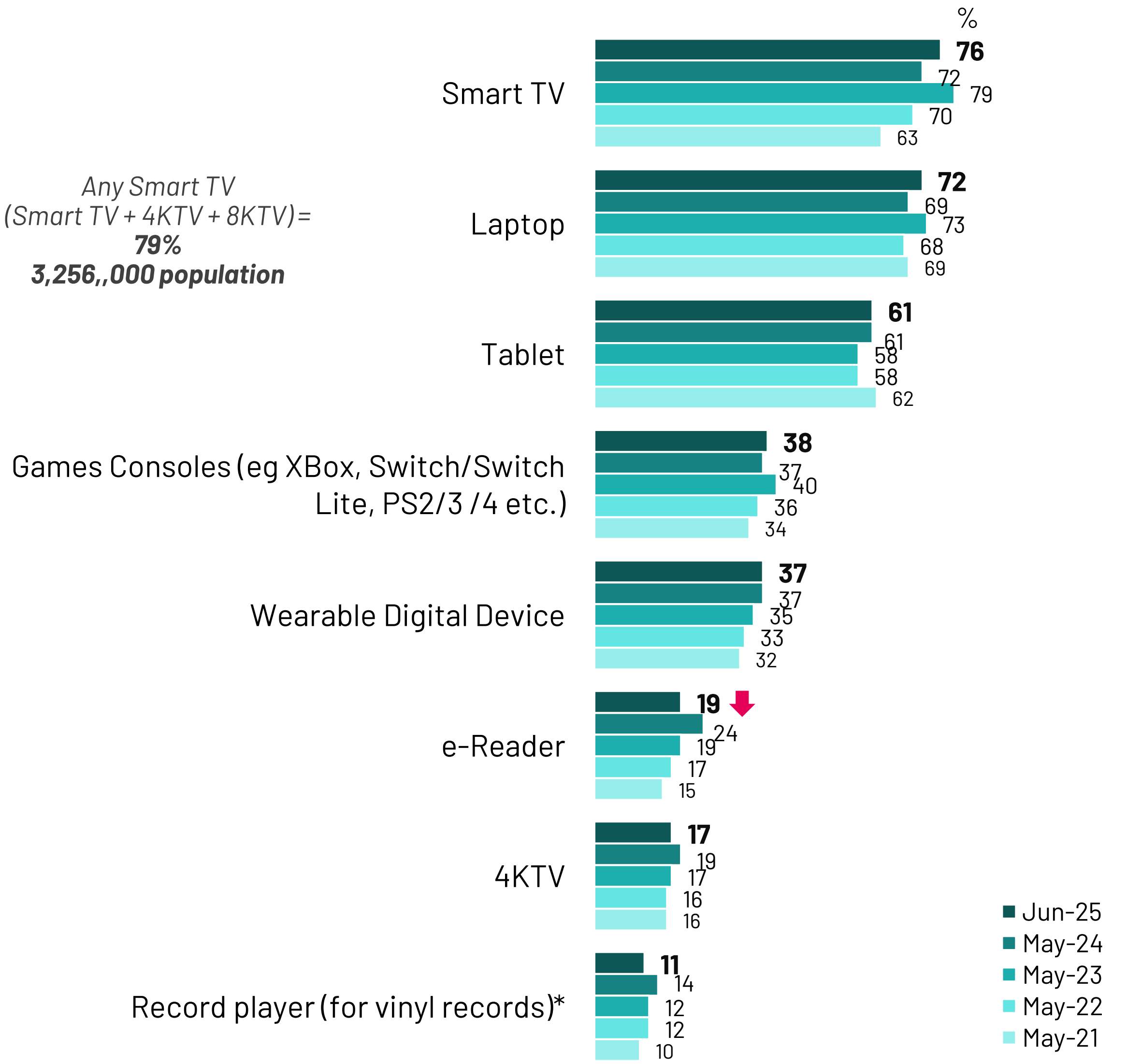
FINDINGS

TECH GEAR – THE MOVE TOWARD A ‘SMART HOME’ CONTINUES

Devices are plateauing across the board

There have been minimal increases for Smart TVs and laptops, but they do not return to levels seen 2023

Devices in Home Trended



Any Smart TV
(Smart TV + 4KTV + 8KTV) =
79%
3,256,,000 population

**Added 2024*

2025 Totals

Any smart TV	79%	(76%)
Laptop	72%	(69%)
Tablet	61%	(61%)
Games console	38%	(37%)
Wearable	37%	(37%)
eReader	19%	(24%)
Record player	11%	(14%)

( ) = 2024 data

Base: All adults aged 16+ - 1,005

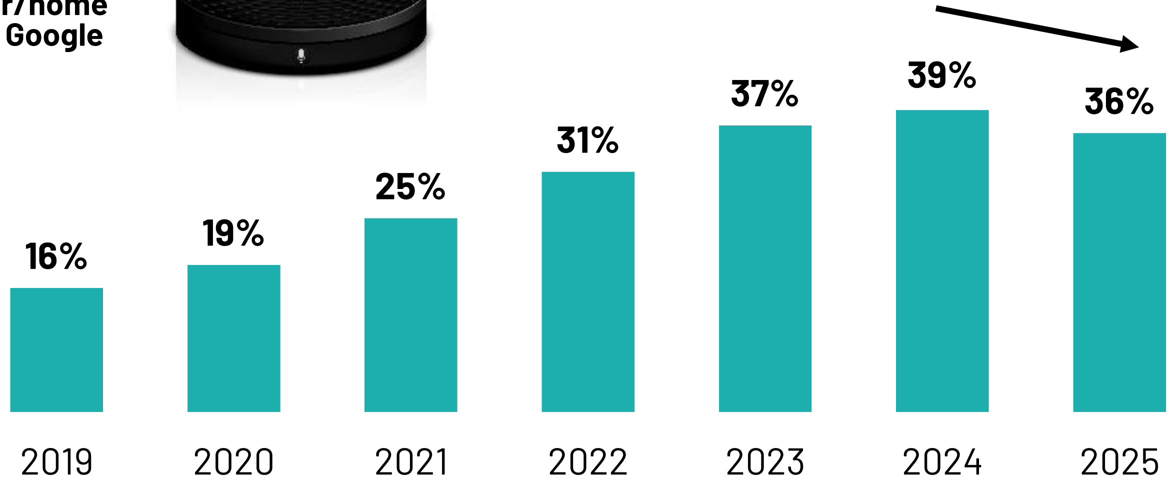
Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

The ‘connected home’ is also showing signs of levelling off

36%

(39%)

have a smart speaker/home assistant e.g. Alexa, Google Home, etc.



Ownership of smart hubs peaks amongst Millennials (46%).

Generations

	2025	2024	± vs 2024
Gen Z	42%	(53%)	-11%
Millennials	46%	(45%)	1%
Gen X	40%	(45%)	-5%
Baby Boomers	21%	(20%)	1%
Silent Gen	0%	(10%)	-10%

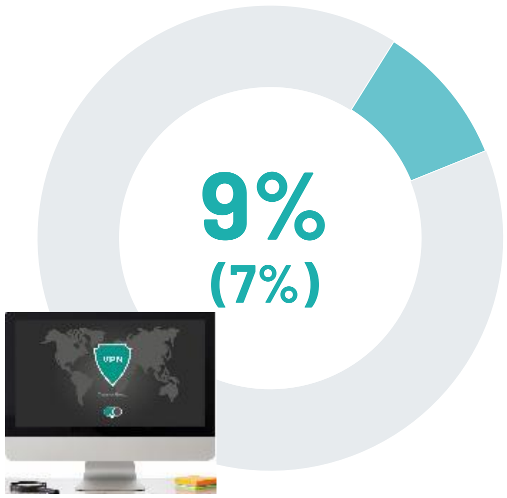
○ = Significantly higher ☐ = Significantly lower

( ) = 2024 data

Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

More niche tech such as smart heating devices and VPNs have remained steady

VPN/Proxy server



Smart home heat devices (e.g. Climate, Hive, Nest etc.)

Older generations continue to show lower usage.

Generations

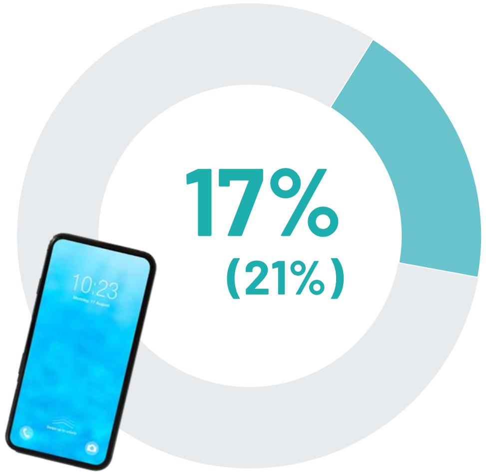
	VPN/ Proxy Server	Smart home heats Devices (e.g. Hive/Nest)
Gen Z	11%	13%
Millennials	13%	15%
Gen X	9%	15%
Baby Boomers	3%	8%
Silent Gen	0%	0%

() = 2024 data

○ = Significantly higher ▭ = Significantly lower

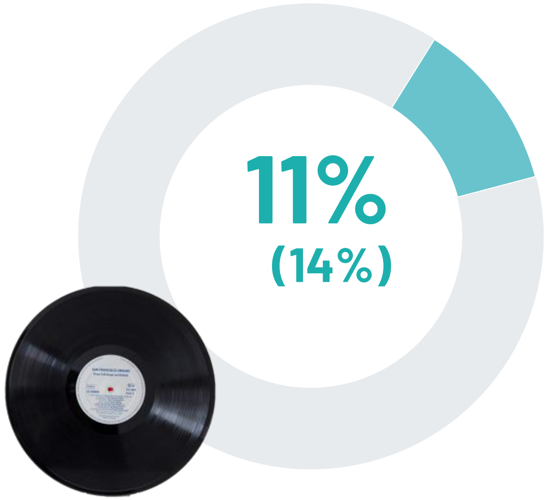
Usage of ‘retro’ devices show signs of decline

Basic Mobile Phone



= 60% Silent Gen

Vinyl Records



= 16% Baby Boomers / Gen X

Older generations continue to show more appetite for this simpler tech

Generations

	Basic Mobile Phone	Vinyl Records
Gen Z	16%	8%
Millennials	11%	7%
Gen X	15%	16%
Baby Boomers	23%	16%
Silent Gen	60%	14%

◯ = Significantly higher 🟥 = Significantly lower

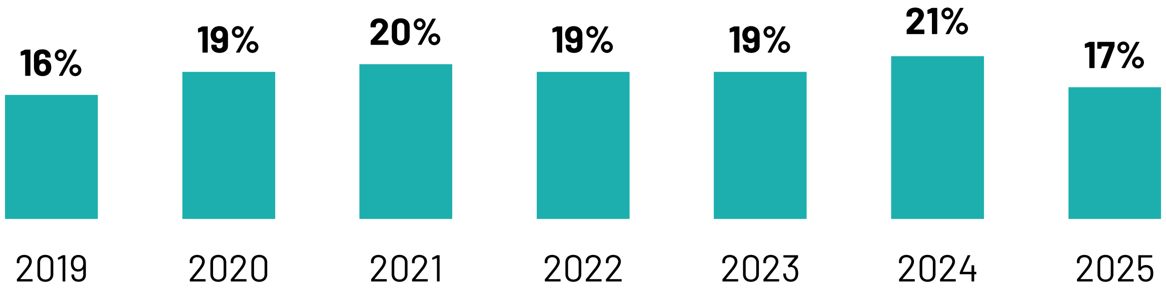
() = 2024 data

Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

Basic mobile phone usage is at its lowest point since 2019, albeit marginal decreases

17%

have a basic mobile phone



Ownership of basic mobile phones peaks amongst Silent Generation and continues to increase.

Generations

	2025	± vs 2024
Gen Z	16%	-2
Millennials	11%	-5
Gen X	15%	-1
Baby Boomers	23%	-2
Silent Gen	60%	+1

( ) = 2024 data

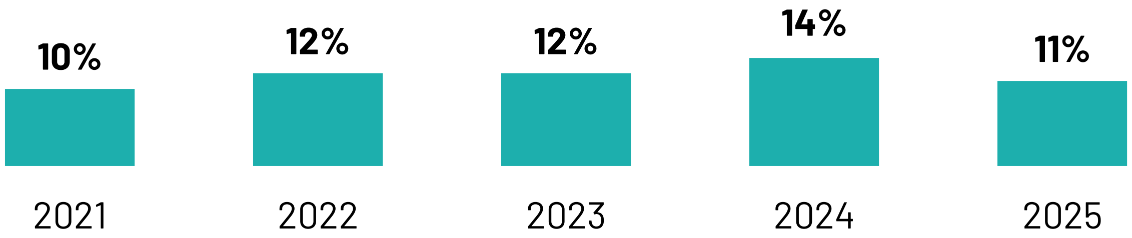
○ = Significantly higher □ = Significantly lower

Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

Record player usage is returning to levels last seen in 2021

11%

have a vinyl record player



Ownership of vinyl record players peaks amongst Gen X and Baby Boomers, albeit this is in decline amongst Baby Boomers (16%).

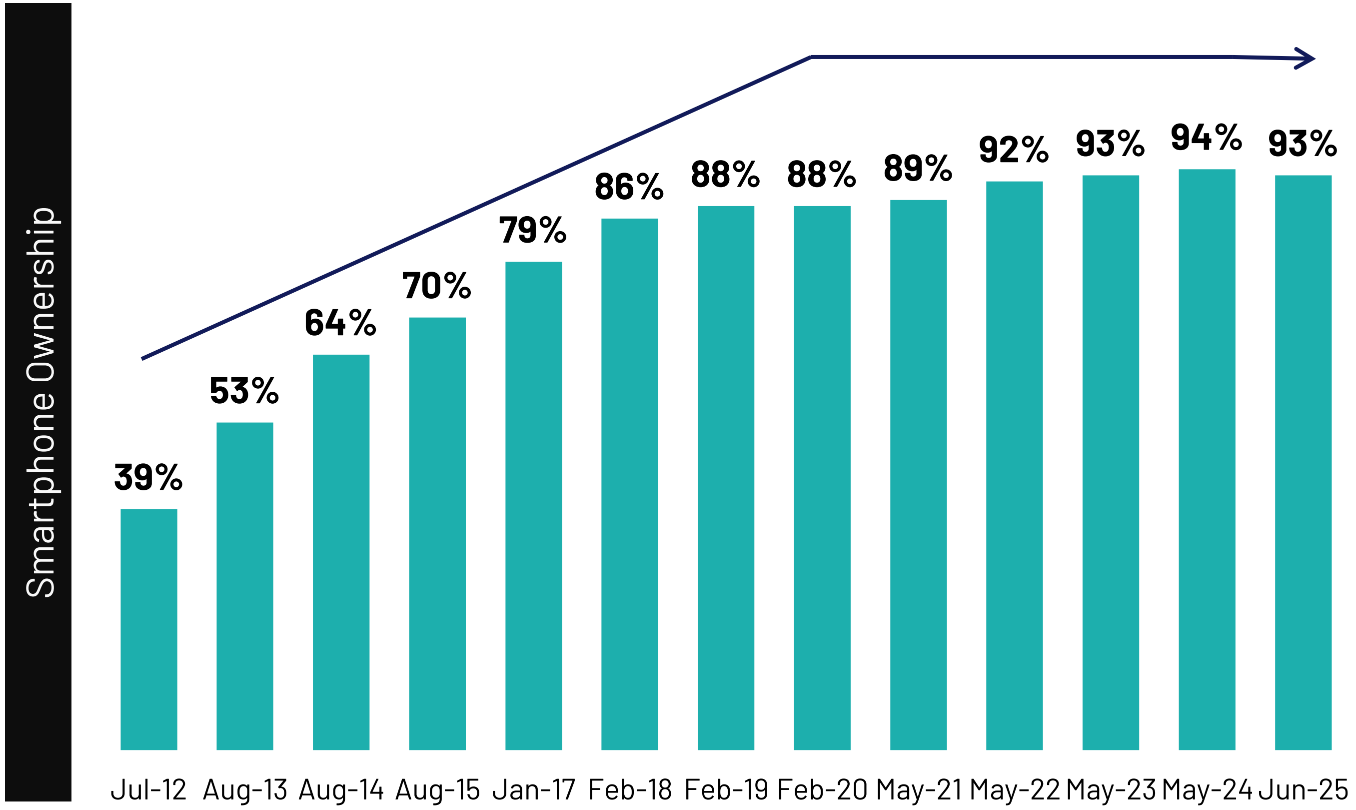
Generations

	2025	± vs 2024
Gen Z	8%	-2
Millennials	7%	-2
Gen X	16%	-1
Baby Boomers	16%	-4
Silent Gen	14%	-2

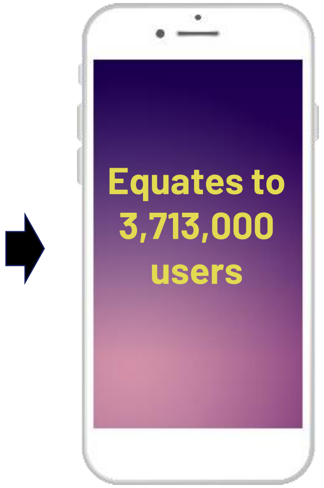
○ = Significantly higher □ = Significantly lower

Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

Smart phone ownership stands at 93%, with clear saturation in the market



Pre-January 2017 comparable data from eir Connected Living Survey 2015



Equates to 3,713,000 users

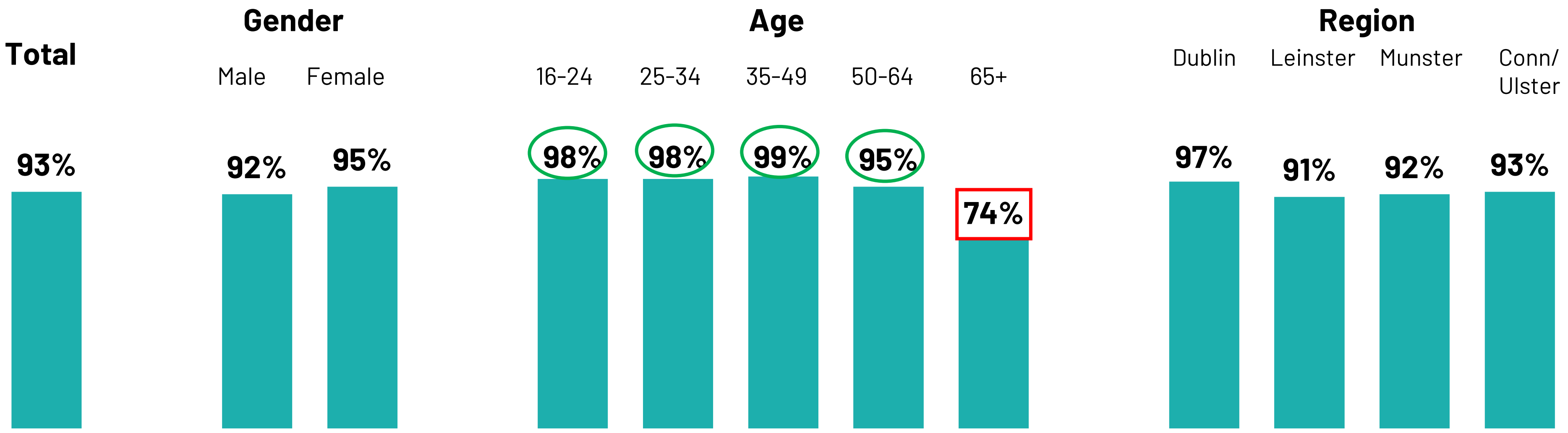
Generations

Gen Z	98%
Millennials	99%
Gen X	96%
Baby Boomers	84%
Silent Gen	40%

○ = Significantly higher ☐ = Significantly lower

We are seeing slight declines across all age groups with the exception of the over 65's (albeit still much lower uptake than the other age groups)

Smartphone ownership x demographics:



	Total	Male	Female	16-24	25-34	35-49	50-64	65+	Dublin	Leinster	Munster	Conn/ Ulster
% May '24	**94**	**95**	**93**	**100**	**100**	**100**	**97**	**71**	**95**	**95**	**91**	**94**
% May '23	93	92	94	100	100	96	93	75	93	92	93	93
% May '22	92	91	93	100	100	98	92	67	95	93	92	86
% May '21	89	89	89	100	99	98	86	57	91	91	86	86
% May '20	88	87	89	99	98	96	84	59	91	88	85	89
% Feb '19	88	87	89	98	100	98	82	54	91	90	87	85
% Feb '18*	86	86	87	100	98	97	83	44	90	88	81	81
% Jan '17	79	79	79	95	92	91	66	32	89	75	78	72
% Aug '15	70	70	70	91	89	81	51	21	76	68	69	63

**Pre-January 2017 comparable data from eir Connected Living Survey 2015*

◯ = Significantly higher ▭ = Significantly lower

Base: All respondents with mobiles – 972

Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

Average number of smart devices in the house has returned to 8 – families with kids (teenage and pre-teen) continue to have the highest number of devices.

Families with teenagers have an average of

12 SMART*

devices at home

Teen Family Pop.
2025 Average = 12
2024 Average = 12
2023 Average = 12
2022 Average = 10
2021 Average = 9

Total Pop.
2025 Average = 8
2024 Average = 9
2023 Average = 8
2022 Average = 8
2021 Average = 7

Families with pre-teens have an average of

12 SMART*

devices at home

Pre Teen Family Pop.
2025 Average = 12
2024 Average = 12
2023 Average = 11
2022 Average = 10
2021 Average = 10

Generations
(Average No.)

	2025	± vs 2024
Gen Z	11	(=)
Millennials	9	(=)
Gen X	10	(=)
Baby Boomers	5	(=)
Silent Gen	2	(=)

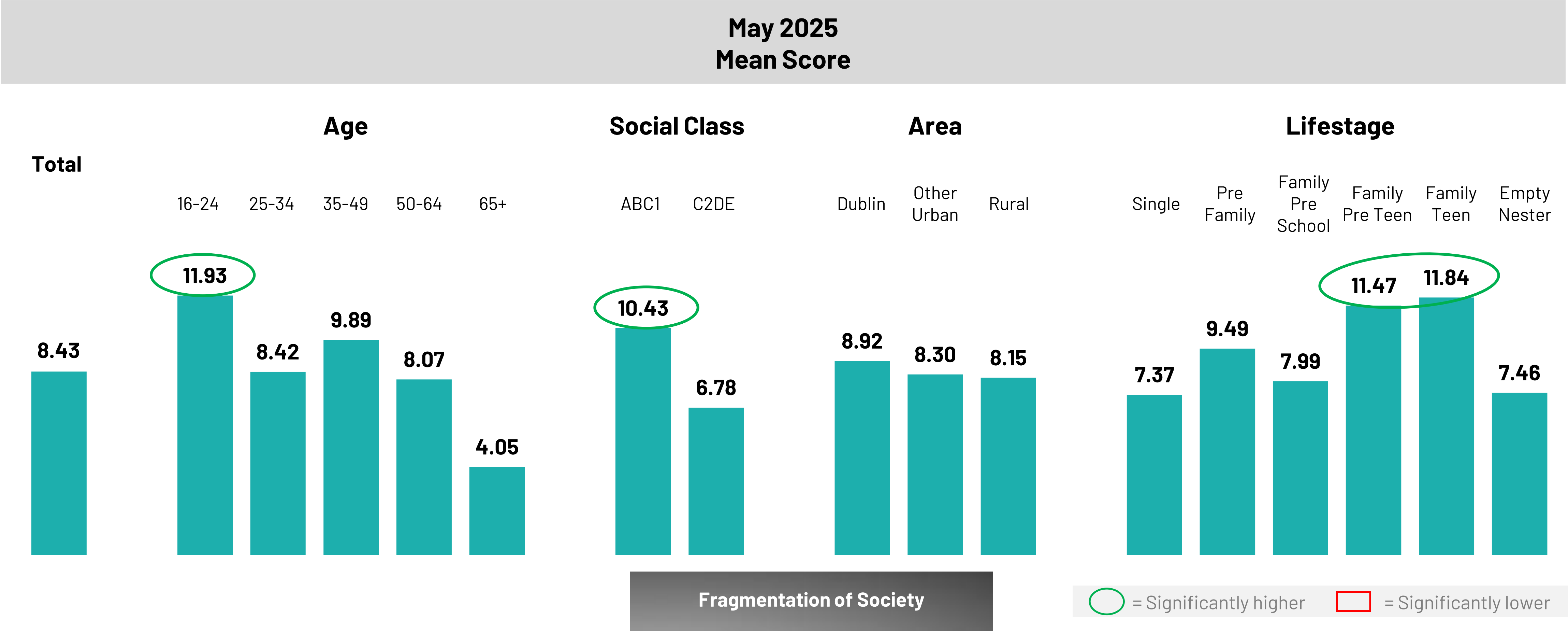
*Defined as smart device (e.g. Smart TV, wearable, laptop, games console , tablet, streaming device, smart speakers, smart home device, ereader)

○ = Significantly higher □ = Significantly lower

Q.2 And how many ... are in the household?

On average, Irish homes have access to 8 smart devices* at home

Driven by younger cohorts - under 24s and those with teenagers and pre-teens in the household show much higher numbers of devices



Fragmentation of Society

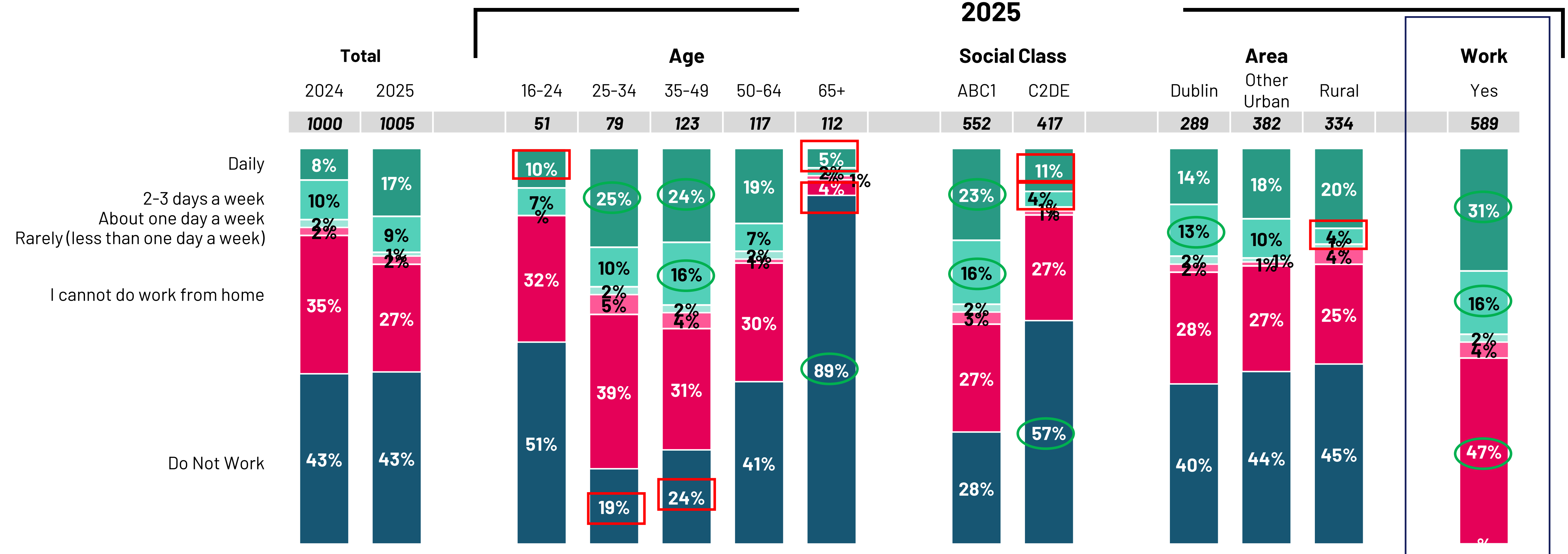
Clear fragmentation in society re tech usage – more usage among younger and white collar cohorts.

Q.2 And how many ...SMART DEVICES are in the household?

*Defined as smart device (e.g. Smart TV, wearable, laptop, games console , tablet, streaming device, smart speakers, smart home device, ereader)

WORKING FROM HOME ISN’T GOING ANYWHERE, REGARDLESS OF THE RETURN TO OFFICE NARRATIVE

Almost half of all workers WFH 2+ days a week. This is a mostly middle class phenomenon. The Dublin centric nature of it has dwindled, with those in other urban areas showing higher rates of more frequent WFH

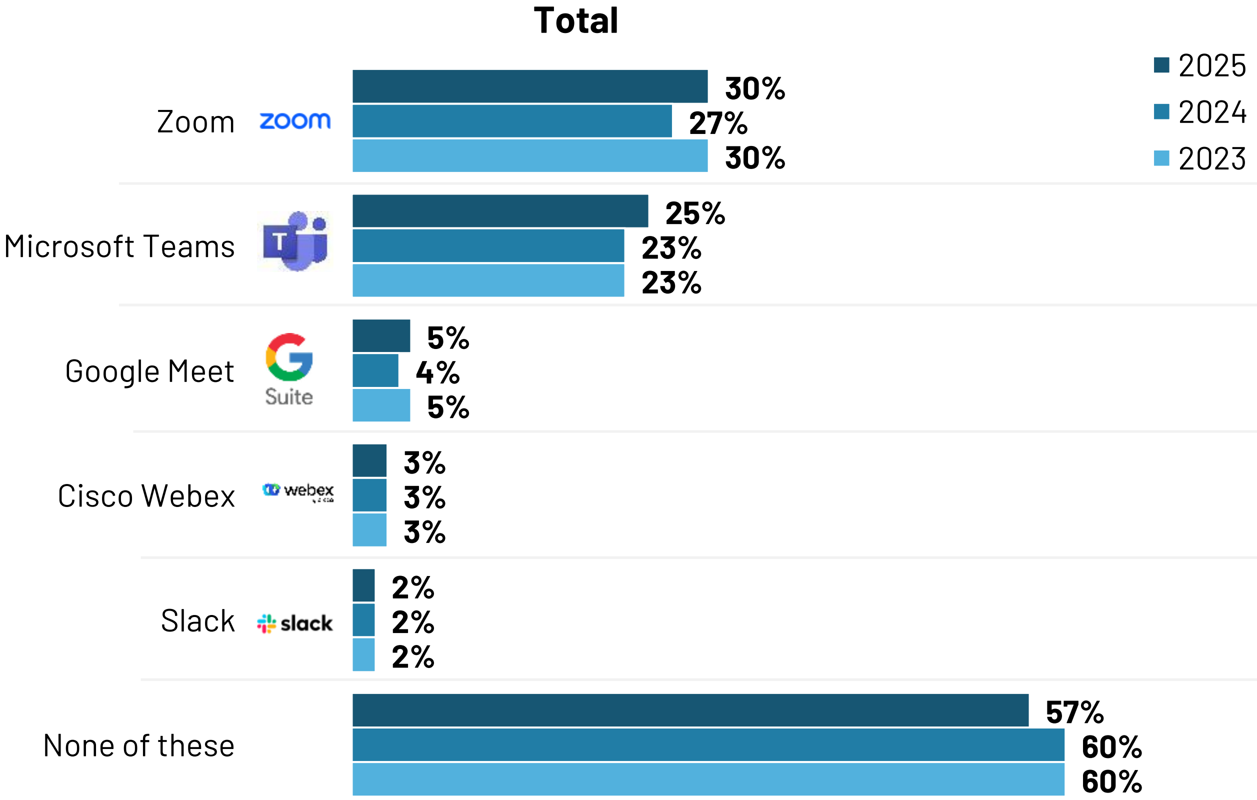


	2024	2025	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Other Urban	Rural	Yes
Any working from home %	22	30	17	42	45	30	7	44	17	31	29	29	53
Any working 2+ days from home %	18	26	17	35	39	26	6	39	15	27	28	24	46

Base: All respondents - 1,005
Q.15 At the moment how often, if at all, do you work from home during the working week?

◯ = Significantly higher ▭ = Significantly lower

43% of the population use one of these video platforms: Zoom continues to lead the way



Any of these 43%

	ALL currently WFH *(Base: 323)*
	%
Zoom	**45**
Microsoft Teams	**50**
Google Meet	7
Cisco Webex	**6**
Slack	**4**

71%

working from home using at least one of these platforms

Non-usage by Age:

16-24	**54%**
25-34	**47%**
35-49	**41%**
50-64	**61%**
65+	**86%**

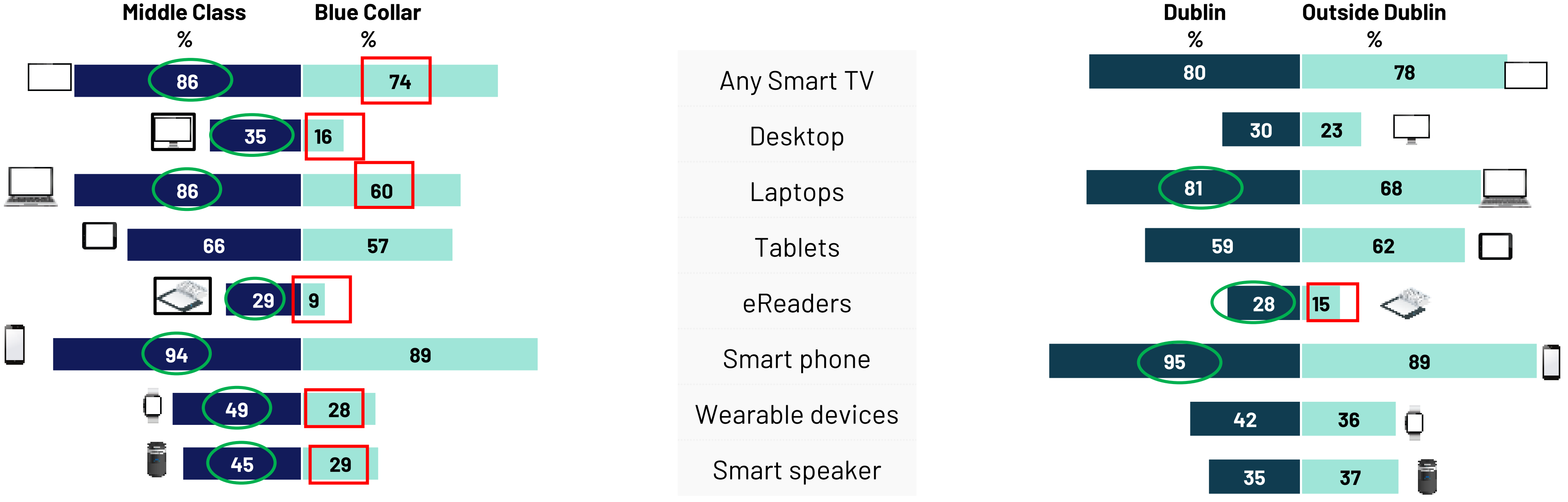
🟩 = Significantly higher 🟥 = Significantly lower

Base: All respondents 1,005
Q.16 What platforms are you using nowadays?

THE SOCIO-ECONOMIC TECH DIVIDE HAS NOT NARROWED, BUT REGIONALLY WE ARE SEEING RURAL COHORTS CATCHING UP (ALBEIT SLOWLY)

A socio-economic tech divide continues to permeate Irish society, but the regional divide is continuing to reduce

Middle class (ABC1) (552) Vs Blue Collar (C2DE) (417) and Dublin (289) Vs Outside (716)



Clear divide on social class: number of smart devices in house

- ABC1 11 devices
- C2DE 7 devices

C2DE also **less likely to use** online entertainment and communication services.

For example, the gap: Netflix (-22%pts), stream music (-22%pts), use Chat GPT (-20%), online banking (-19%pts), Amazon Prime (-18%), podcasts (-22%pts).

Less likely to use social media sites (-13%pts).

Cohorts outside Dublin have caught up in terms of smart devices

- Dublin 9 devices
- Outside 9 devices

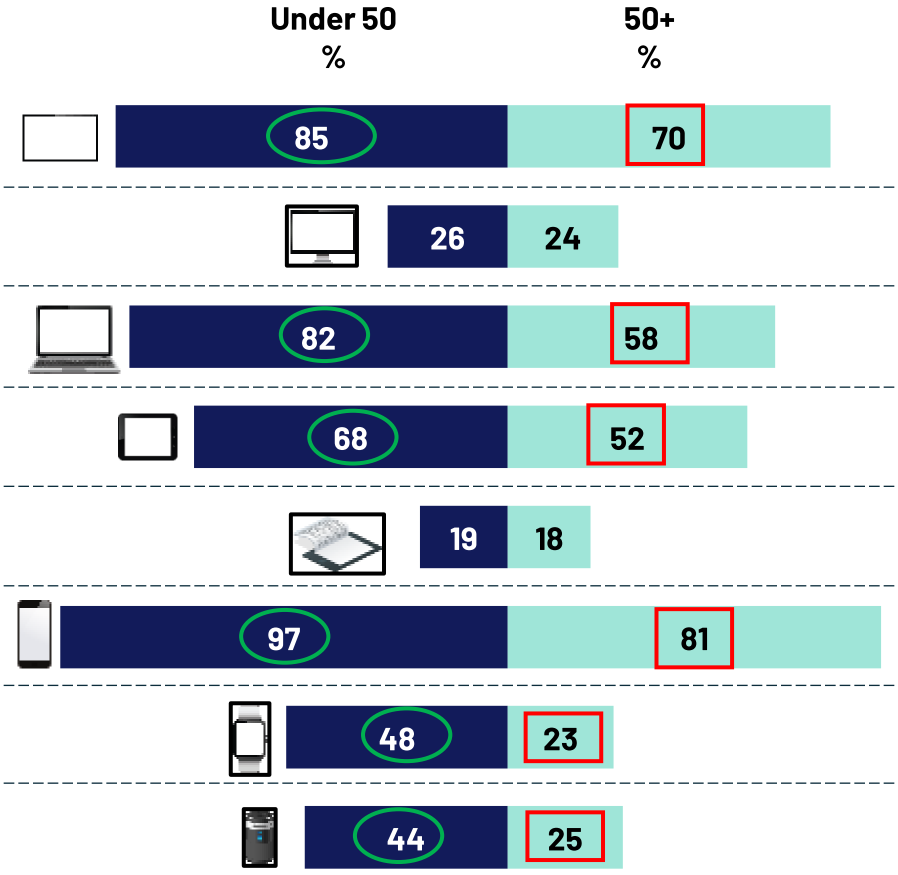
When focusing on specific services, those in Dublin show higher usage a number of areas (work email, personal mail, online banking, Netflix, Chat GPT, calls via WhatsApp).
Those living in **Dublin are more likely to agree** that "BB is more important than TV" vs Non-Dubliners

○ = Significantly higher □ = Significantly lower

A generational divide still very much at play

Aged under 50 v's Aged 50+ and Generations comparison

🟩 = Significantly higher 🟥 = Significantly lower



	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
	%	%	%	%	%
Any Smart TV	81	**87**	**85**	**64**	**55**
Desktop	**33**	22	27	21	13
Laptops	**82**	**82**	78	**50**	**29**
Tablets	66	66	**69**	**47**	**16**
eReaders	19	20	20	17	**5**
Smart phone	**98**	**96**	93	**79**	**38**
Wearable devices	**50**	**47**	41	**15**	**2**
Smart speaker	42	**46**	40	**21**	-

Clear divide on age brackets: number of smart devices in house

- Under 50 10 devices
- 50+ 7 devices

Clear divide between generations: number of smart devices in house

Growth is at the younger end of the market

- **Gen Z 11 devices**
- **Millennials 10 devices**
- **Gen X 10 devices**
- Baby Boomers 5 devices
- Silent Gen 3 devices

58%

Of those over 65 years are now using the internet at least daily

Up from 54% in 2024

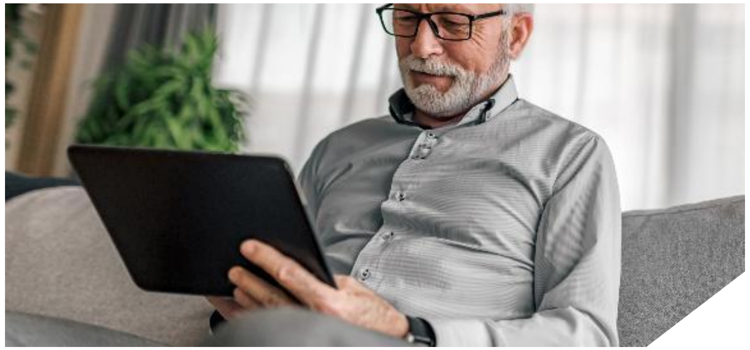
This is growing year-on-year (51% in 2023), illustrating an increasingly online world

Internet usage remains steady, but there is continued growth among over 65s.

Increase in YOY daily internet usage as

88% **(88%)**

of all adults aged 16+ access the internet once a day or more often



58% **(54%)**

of those 65 yrs+ now access the internet once a day or more often – indicating growth

6% (6%) of population never access the internet
(25% (30%) amongst those aged 65+ years)

( ) = 2024 data

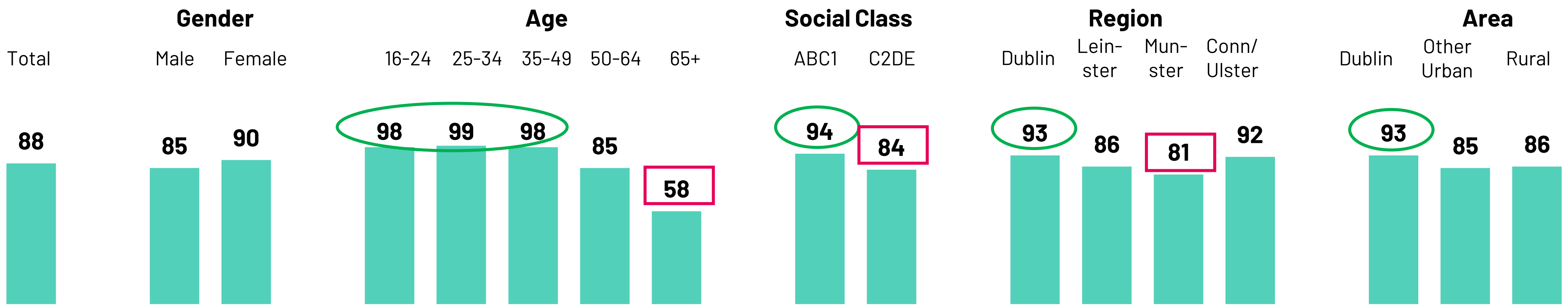
Generations

	2025	± vs 2024
Gen Z	99%	+1
Millennials	99%	+2
Gen X	90%	-8%
Baby Boomers	67%	-6%
Silent Gen	33%	+9%

○ = Significantly higher □ = Significantly lower

9 in 10 of us access the internet once a day or more often, with Dublin dwellers showing higher usage.

% Accessing the internet at least once a day



	Total	Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Leinster	Munster	Conn/ Ulster	Dublin	Other Urban	Rural
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
May '24	**88**	**90**	**87**	**98**	**98**	**98**	**94**	**54**	**94**	**84**	**89**	**89**	**86**	**92**	**89**	**91**	**85**
May '23	85	82	88	98	98	95	84	51	95	77	87	86	84	82	87	90	77
May '22	84	84	85	99	97	95	80	52	92	78	90	85	80	82	90	84	81
May '21	80	78	82	99	95	92	73	43	92	72	88	85	71	75	88	75	78
Mar '20	81	79	83	98	95	94	73	39	91	73	85	80	78	78	85	77	80
Feb '19	75	73	76	88	97	87	67	31	82	70	78	78	69	73	78	76	74
Feb '18	80	77	76	98	95	91	62	30	92	69	92	75	74	69	89	80	73
Jan '17	79	79	78	100	95	91	62	30	92	69	92	75	74	69	84		70
*Aug '15	75	76	74	96	93	86	54	33	84	67	81	78	75	66	82		65

Base: all Adults 16+ - 1,005

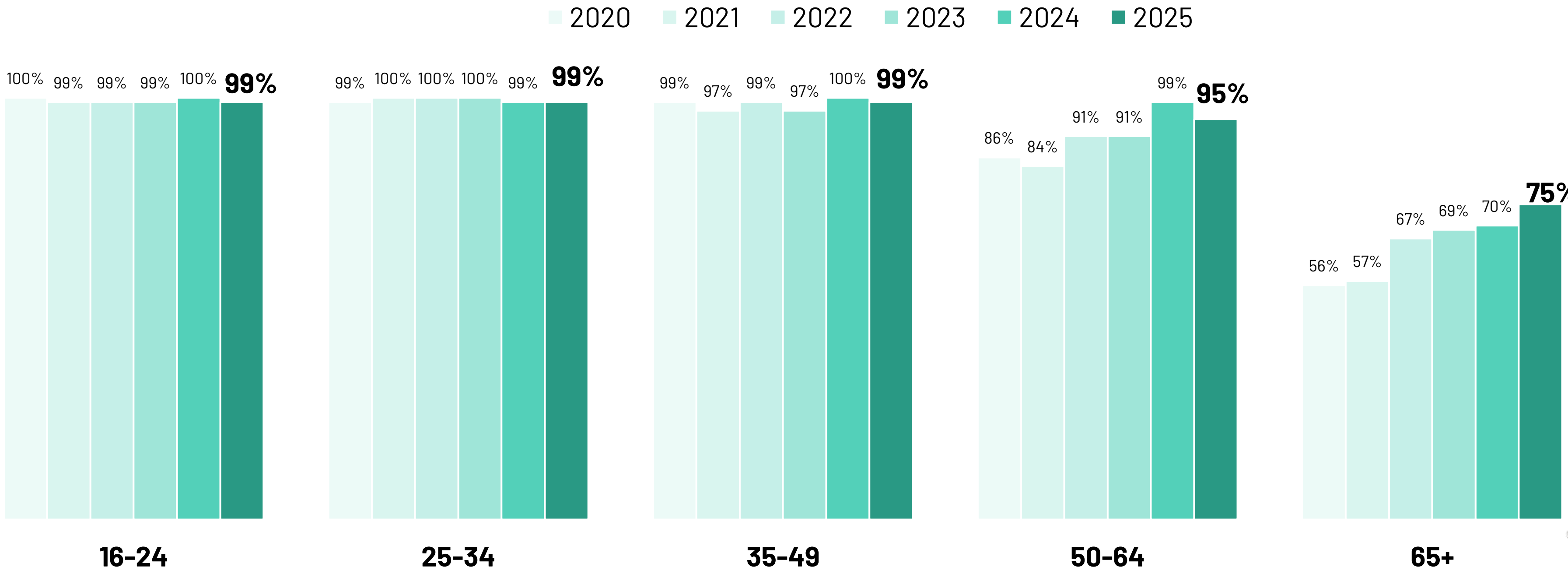
Q.4 How often do you yourself access the internet nowadays?

○ = Significantly higher □ = Significantly lower

Pre-January 2017 comparable data from eir Connected Living Survey 2015

% Ever use the internet by age bands over time

Base: all Adults 16+ - 1,000



3 in 4

over 65's are using the internet to any extent

◯ = Significantly higher ▭ = Significantly lower

Q.4 How often do you yourself access the internet nowadays?

USAGE OF AND ATTITUDES TOWARDS AI

Chat GPT/other Gen AI usage

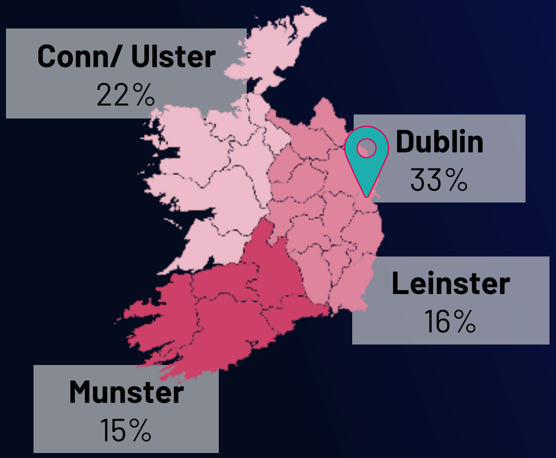
22%

(16%)

of pop.

(889,000 consumers) now use Chat GPT or other generative AI in Ireland. Driven by **middle class, Dubliners, Gen Z,** and **Millennials**

Region



Social class

ABC1	C2DE
○ 32%	□ 12%

Generations

		± vs 2024
Gen Z	○ 37%	+11%
Millennials	○ 30%	+8%
Gen X	17%	+3%
Baby Boomers	□ 5%	+2%
Silent Gen	□ -	-

○ = Significantly higher □ = Significantly lower

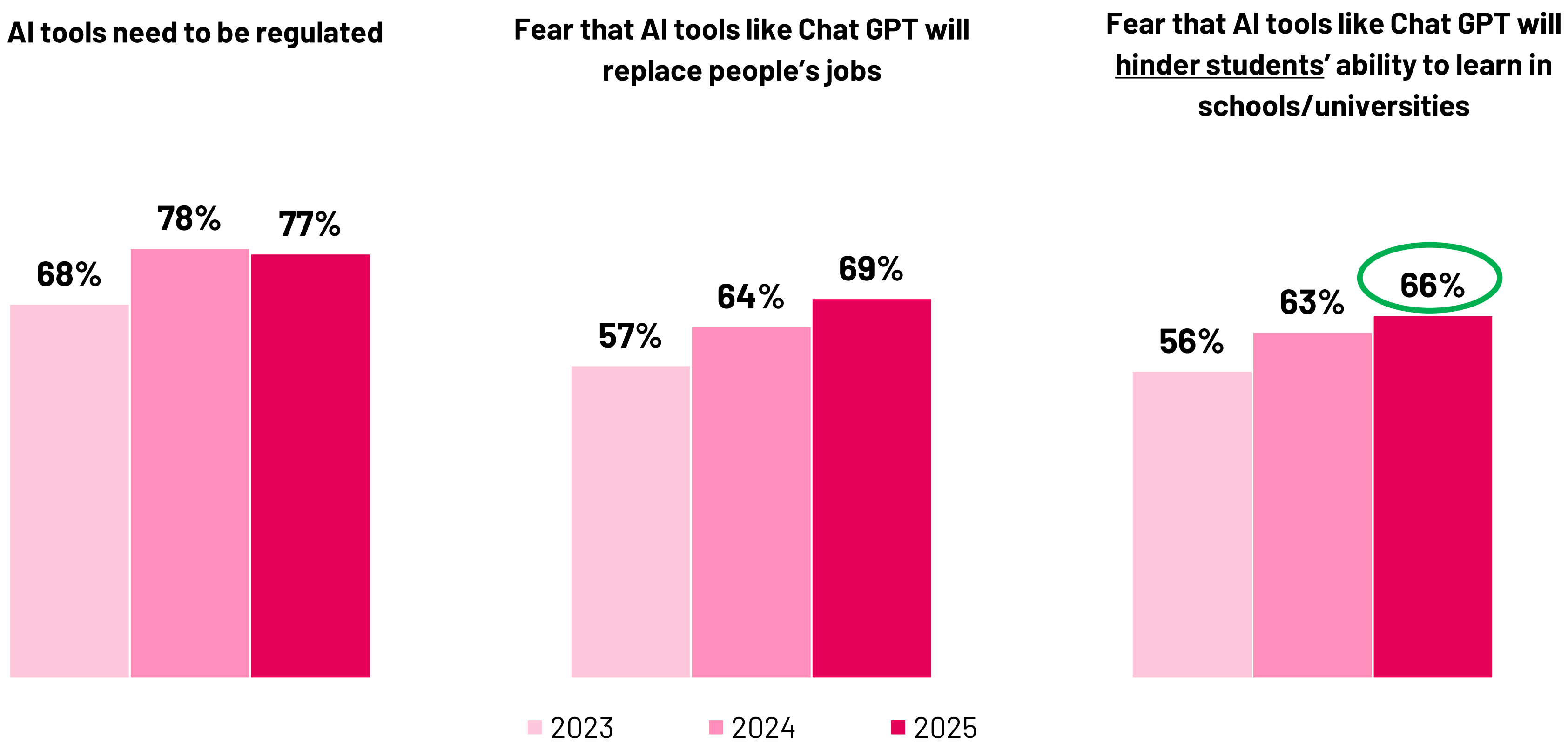
( ) = 2024 data

* Wording change in 2024

Q.3 Which of these do you do nowadays anywhere ...Use Chat GPT or other Generative AI *

Concerns surrounding AI continue in 2025 ...

As we learn more about the possibilities of AI, fears continue to build.



AI tools need to be regulated

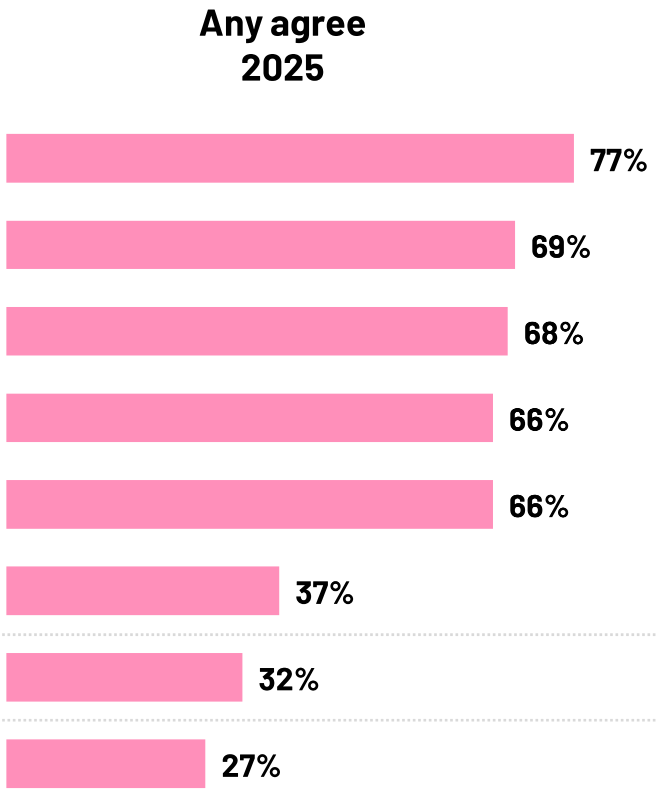
Fear that AI tools like Chat GPT will replace people's jobs

Fear that AI tools like Chat GPT will hinder students' ability to learn in schools/universities

○ = Significantly higher ☐ = Significantly lower

Base: all Adults 16+ - 1005
Q.13 To what extent do you agree or disagree ...

Clear concerns surrounding the use of AI and data, with Millennials and Gen X indicating most concern



	Any agree 2025	Generations				
		Gen Z	Mille-nnials	Gen X	Baby Boomers	Silent Gen
		154	*316*	*228*	*278*	*29*
		%	%	%	%	%
I feel that AI tools need to be regulated	77%	74	85	79	73	40
I fear that AI tools like OpenAI, ChatGPT, etc. will replace many peoples' jobs	69%	67	71	76	63	45
I am concerned in general nowadays regarding how my data is used by organisations	68%	63	74	76	61	37
I am concerned about the growth in AI (Artificial Intelligence)	66%	56	72	71	62	49
I fear that AI tools like OpenAI, ChatGPT, etc. will hinder students' ability to learn in schools and universities	66%	61	71	71	62	40
Technology is having a negative impact on family life in my home (e.g. people spending too much time on different devices, etc)	37%	37	42	47	22	24
*I feel I can't really cut back on my own smartphone usage, even though I want to	32%	55	34	29	14	7
I follow a lot of celebrities, youtubers or "influencers"	27%	57	29	21	7	5

Base: All adults 16+ - 1005
Q.13 To what extent do you agree or disagree ...

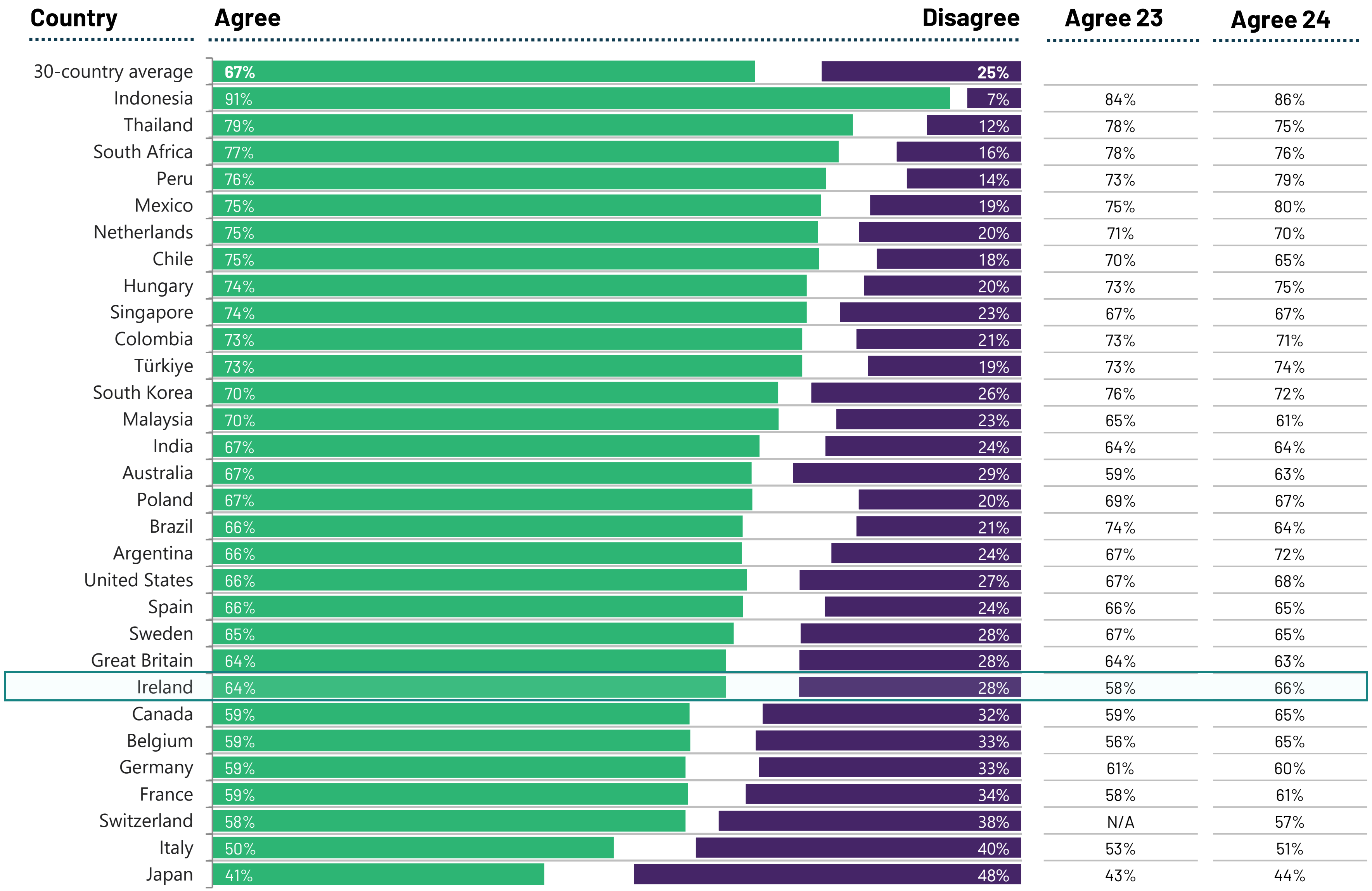
* New statement 2025
** Wording change in 2025

🟩 = Significantly higher 🟥 = Significantly lower

WHAT PEOPLE KNOW ABOUT AI

How much do you agree or disagree with the following?

I have a good understanding of what artificial intelligence is



Country	Agree	Disagree	Agree 23	Agree 24
30-country average	**67%**	**25%**		
Indonesia	91%	7%	84%	86%
Thailand	79%	12%	78%	75%
South Africa	77%	16%	78%	76%
Peru	76%	14%	73%	79%
Mexico	75%	19%	75%	80%
Netherlands	75%	20%	71%	70%
Chile	75%	18%	70%	65%
Hungary	74%	20%	73%	75%
Singapore	74%	23%	67%	67%
Colombia	73%	21%	73%	71%
Türkiye	73%	19%	73%	74%
South Korea	70%	26%	76%	72%
Malaysia	70%	23%	65%	61%
India	67%	24%	64%	64%
Australia	67%	29%	59%	63%
Poland	67%	20%	69%	67%
Brazil	66%	21%	74%	64%
Argentina	66%	24%	67%	72%
United States	66%	27%	67%	68%
Spain	66%	24%	66%	65%
Sweden	65%	28%	67%	65%
Great Britain	64%	28%	64%	63%
Ireland	64%	28%	58%	66%
Canada	59%	32%	59%	65%
Belgium	59%	33%	56%	65%
Germany	59%	33%	61%	60%
France	59%	34%	58%	61%
Switzerland	58%	38%	N/A	57%
Italy	50%	40%	53%	51%
Japan	41%	48%	43%	44%

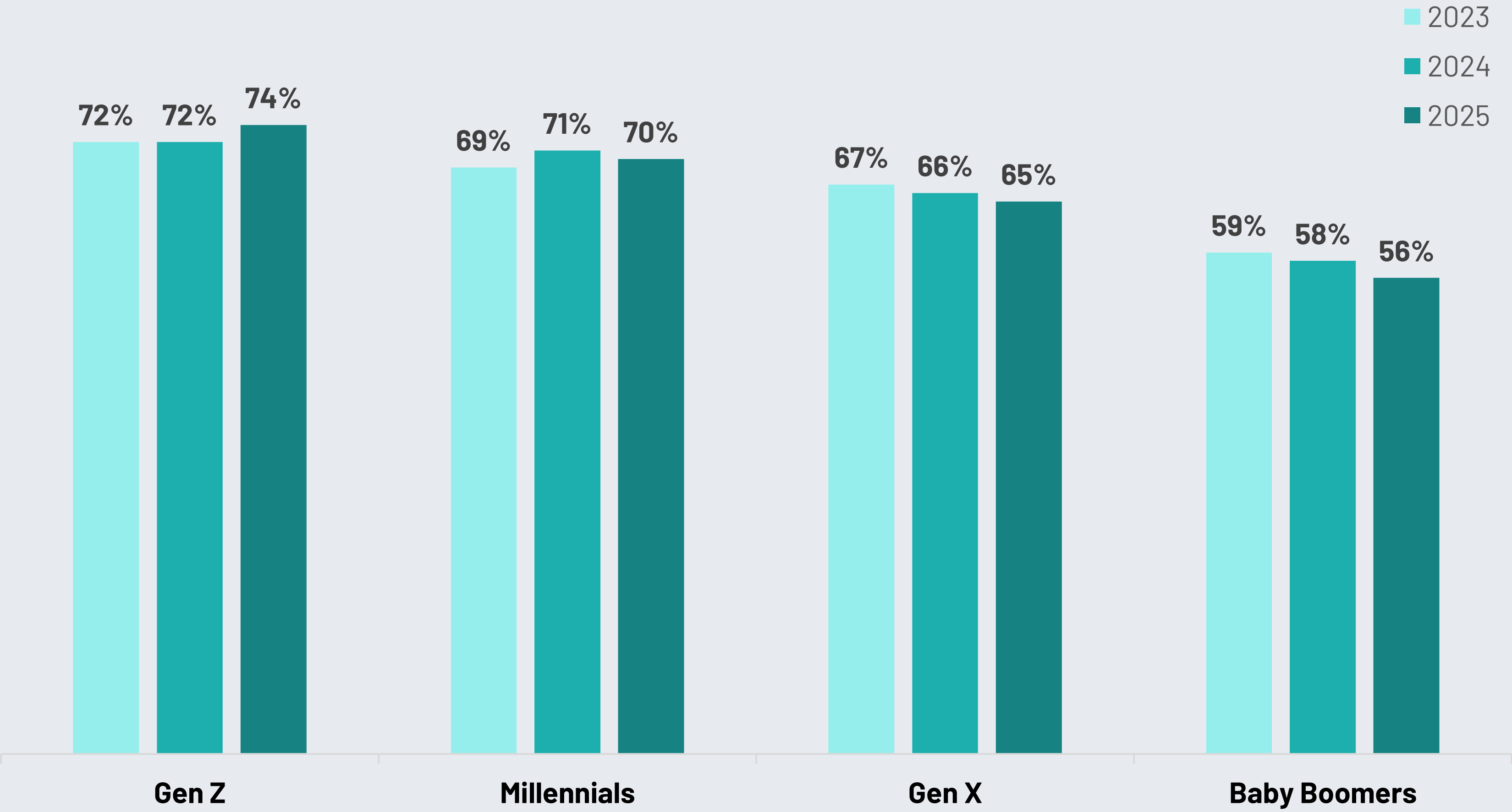
Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

How much do you agree or disagree with the following?

I have a good understanding of what artificial intelligence is

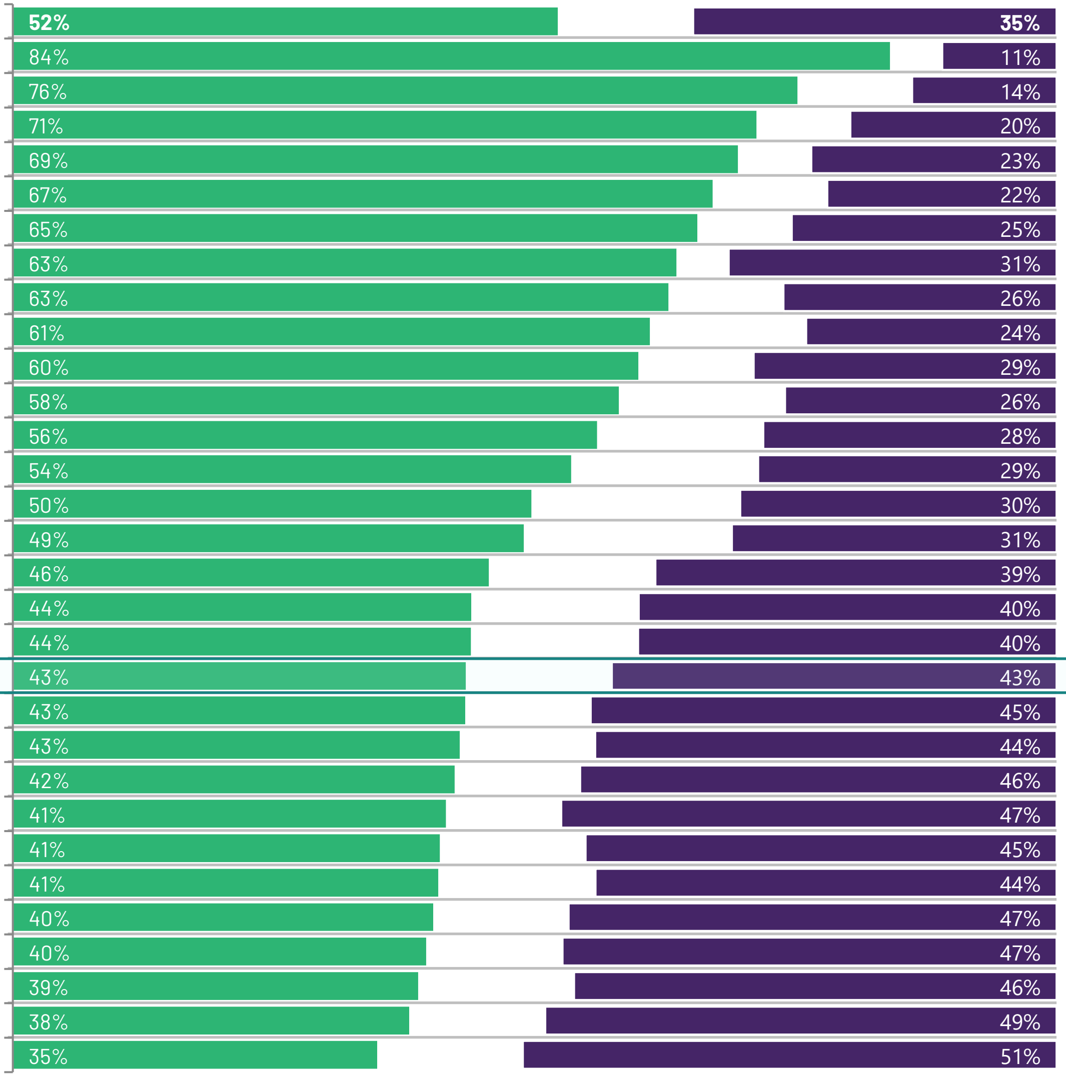
Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

Changes across generations in recent years



How much do you agree or disagree with the following?

I know which types of products and services use artificial intelligence



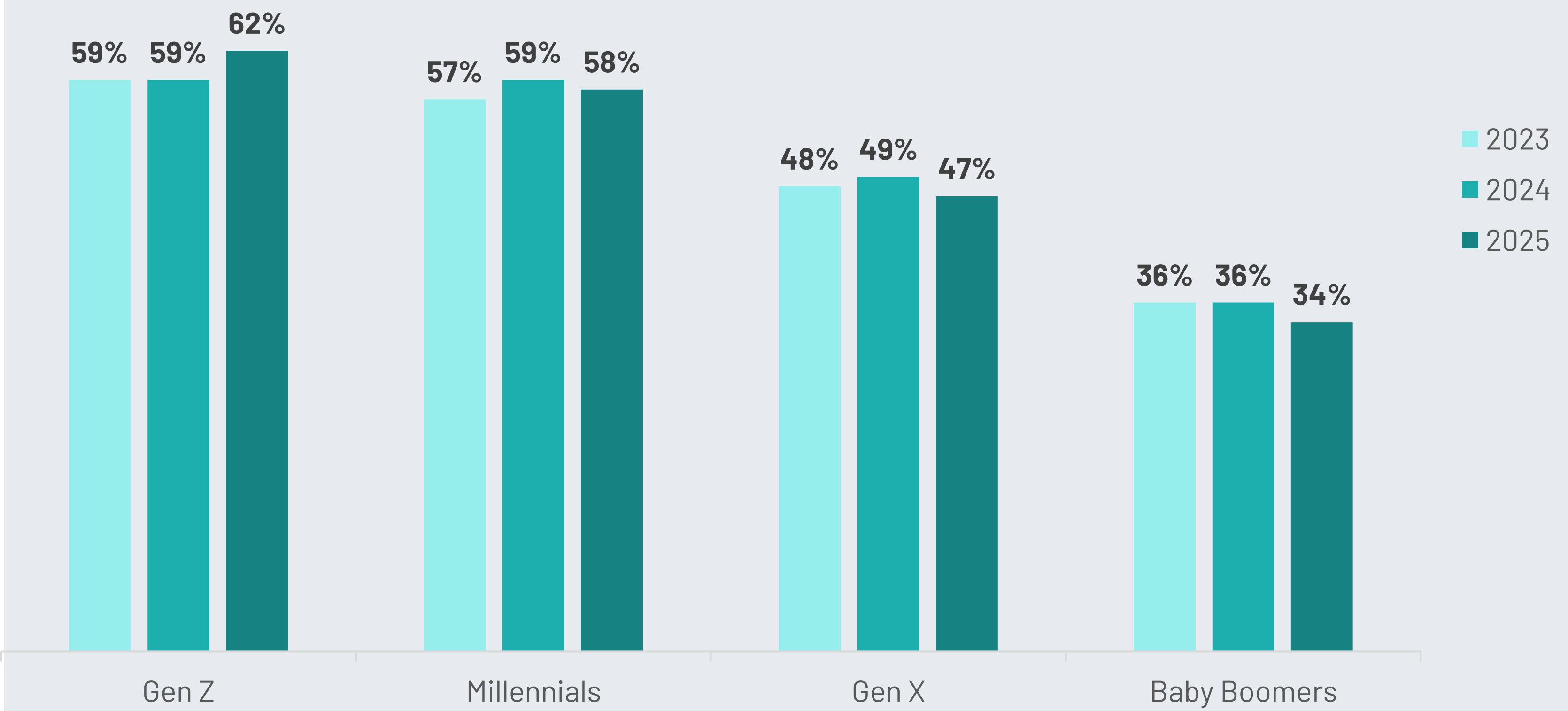
Country	Agree	Disagree	Agree 23	Agree 24
30-country average	**52%**	**35%**		
Indonesia	84%	11%	76%	80%
Thailand	76%	14%	73%	69%
Malaysia	71%	20%	68%	61%
Singapore	69%	23%	57%	56%
Türkiye	67%	22%	71%	67%
India	65%	25%	62%	62%
South Korea	63%	31%	68%	65%
Mexico	63%	26%	61%	65%
Peru	61%	24%	65%	65%
Chile	60%	29%	58%	53%
South Africa	58%	26%	60%	64%
Brazil	56%	28%	62%	57%
Colombia	54%	29%	53%	60%
Poland	50%	30%	46%	47%
Argentina	49%	31%	44%	51%
Italy	46%	39%	50%	51%
Spain	44%	40%	46%	46%
United States	44%	40%	35%	39%
Ireland	43%	43%	36%	40%
Switzerland	43%	45%	N/A	42%
Sweden	43%	44%	36%	39%
Australia	42%	46%	38%	38%
Netherlands	41%	47%	42%	37%
Hungary	41%	45%	37%	41%
Great Britain	41%	44%	43%	40%
Germany	40%	47%	39%	41%
France	40%	47%	37%	41%
Canada	39%	46%	38%	36%
Japan	38%	49%	38%	40%
Belgium	35%	51%	35%	37%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

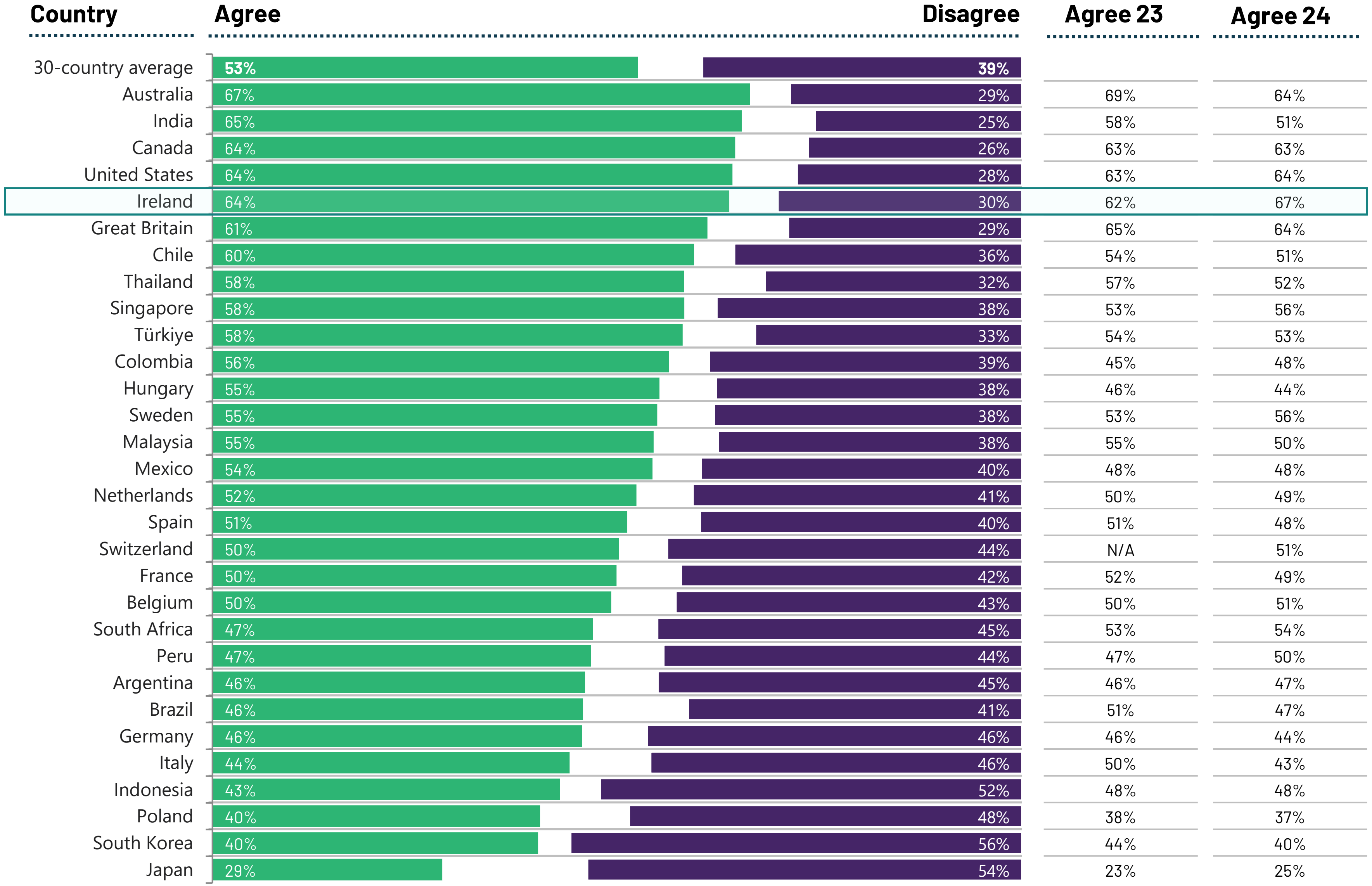
How much do you agree or disagree with the following? **I know which types of products and services use artificial intelligence**

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

Changes across generations in recent years



How much do you agree or disagree with the following? **Products and services using artificial intelligence make me nervous**



Country	Agree	Disagree	Agree 23	Agree 24
30-country average	**53%**	**39%**		
Australia	67%	29%	69%	64%
India	65%	25%	58%	51%
Canada	64%	26%	63%	63%
United States	64%	28%	63%	64%
Ireland	64%	30%	62%	67%
Great Britain	61%	29%	65%	64%
Chile	60%	36%	54%	51%
Thailand	58%	32%	57%	52%
Singapore	58%	38%	53%	56%
Türkiye	58%	33%	54%	53%
Colombia	56%	39%	45%	48%
Hungary	55%	38%	46%	44%
Sweden	55%	38%	53%	56%
Malaysia	55%	38%	55%	50%
Mexico	54%	40%	48%	48%
Netherlands	52%	41%	50%	49%
Spain	51%	40%	51%	48%
Switzerland	50%	44%	N/A	51%
France	50%	42%	52%	49%
Belgium	50%	43%	50%	51%
South Africa	47%	45%	53%	54%
Peru	47%	44%	47%	50%
Argentina	46%	45%	46%	47%
Brazil	46%	41%	51%	47%
Germany	46%	46%	46%	44%
Italy	44%	46%	50%	43%
Indonesia	43%	52%	48%	48%
Poland	40%	48%	38%	37%
South Korea	40%	56%	44%	40%
Japan	29%	54%	23%	25%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

How much do you agree or disagree with the following? **Products and services using artificial intelligence make me excited**

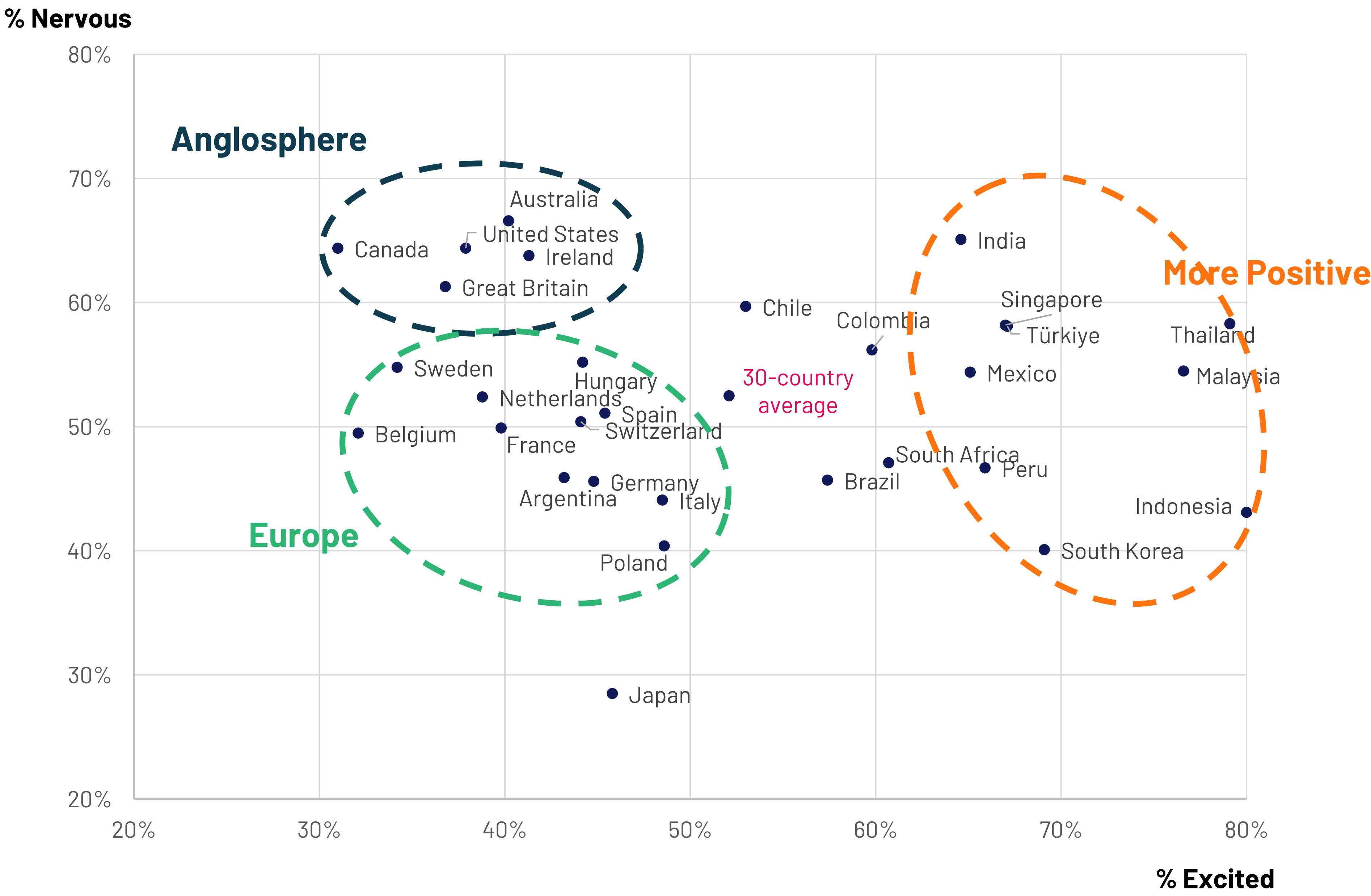
Country	Agree	Disagree	Agree 23	Agree 24
30-country average	**52%**	**39%**		
Indonesia	80%	16%	75%	76%
Thailand	79%	14%	80%	76%
Malaysia	77%	17%	74%	68%
South Korea	69%	27%	76%	73%
Türkiye	67%	24%	74%	70%
Singapore	67%	27%	65%	64%
Peru	66%	27%	72%	67%
Mexico	65%	29%	74%	70%
India	65%	26%	66%	63%
South Africa	61%	31%	59%	61%
Colombia	60%	32%	62%	63%
Brazil	57%	29%	66%	56%
Chile	53%	41%	51%	46%
Poland	49%	41%	50%	44%
Italy	49%	42%	50%	49%
Japan	46%	40%	51%	47%
Spain	45%	44%	50%	45%
Germany	45%	45%	43%	46%
Hungary	44%	49%	45%	47%
Switzerland	44%	50%	N/A	42%
Argentina	43%	44%	46%	52%
Ireland	41%	50%	38%	40%
Australia	40%	52%	40%	39%
France	40%	51%	36%	39%
Netherlands	39%	55%	42%	40%
United States	38%	53%	36%	34%
Great Britain	37%	53%	42%	38%
Sweden	34%	57%	32%	36%
Belgium	32%	59%	35%	33%
Canada	31%	58%	37%	37%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

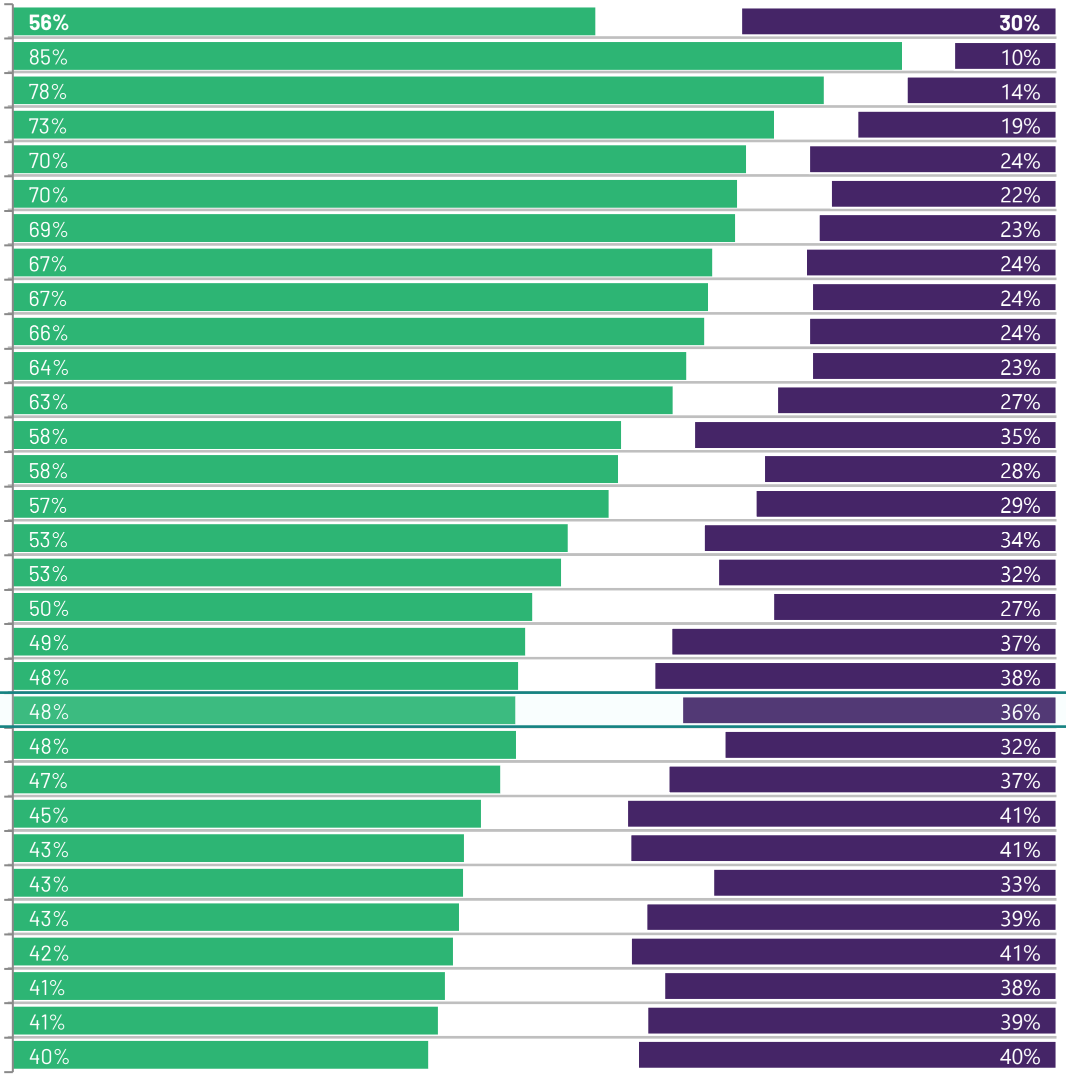
How much do you agree or disagree with the following?

- **Products and services using artificial intelligence make me nervous**
- **Products and services using artificial intelligence make me excited**

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025



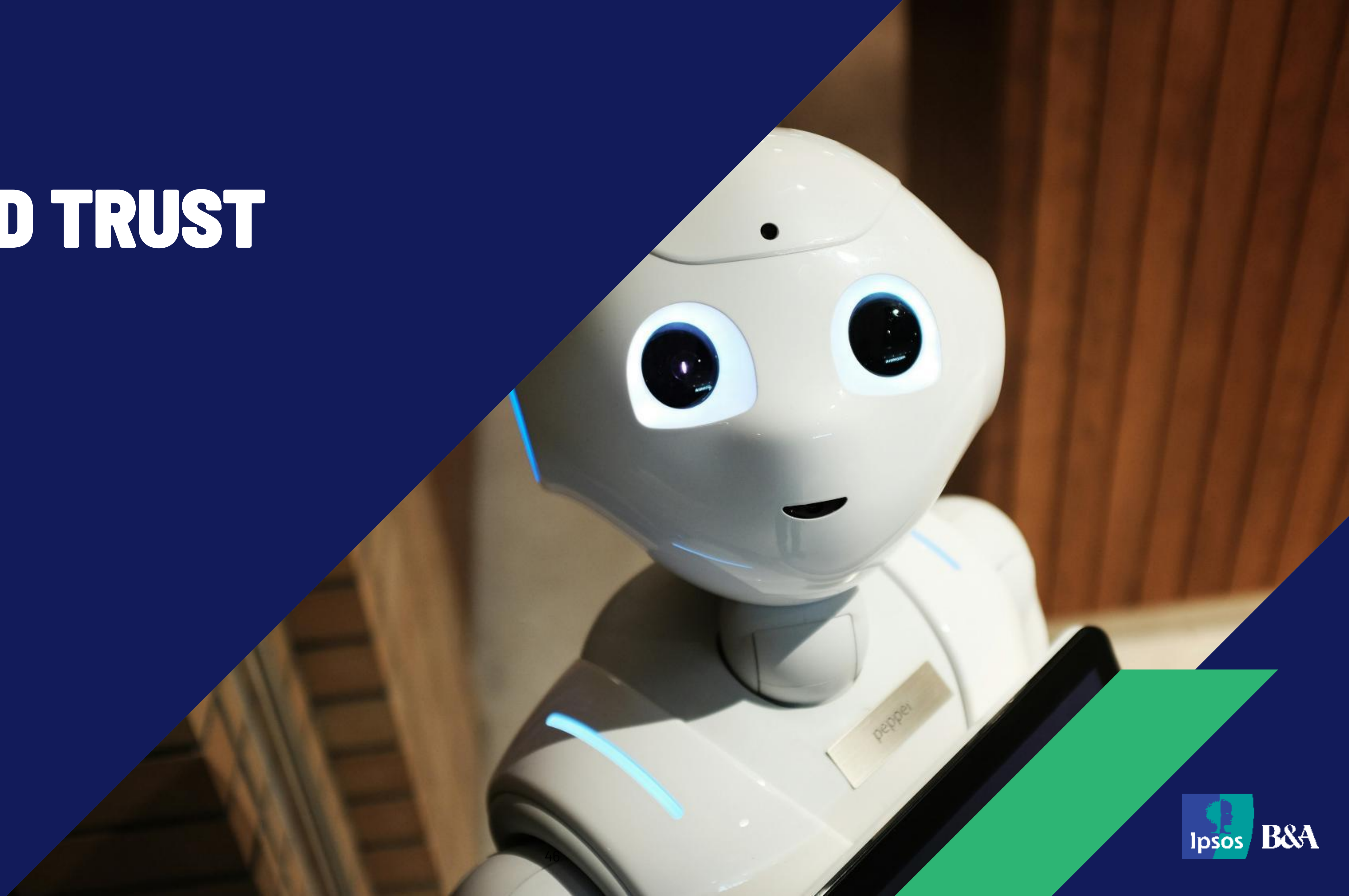
How much do you agree or disagree with the following? **Products and services using artificial intelligence have more benefits than drawbacks**



Country	Agree	Disagree	Agree 23	Agree 24
30-country average	**56%**	**30%**		
Indonesia	85%	10%	78%	80%
Thailand	78%	14%	74%	77%
Singapore	73%	19%	64%	66%
Mexico	70%	24%	73%	70%
Malaysia	70%	22%	69%	63%
Peru	69%	23%	67%	70%
South Korea	67%	24%	66%	66%
India	67%	24%	65%	62%
Türkiye	66%	24%	67%	69%
South Africa	64%	23%	59%	62%
Chile	63%	27%	59%	60%
Colombia	58%	35%	65%	66%
Brazil	58%	28%	64%	56%
Argentina	57%	29%	57%	57%
Italy	53%	34%	55%	53%
Spain	53%	32%	50%	50%
Poland	50%	27%	47%	44%
Germany	49%	37%	42%	47%
Hungary	48%	38%	47%	51%
Ireland	48%	36%	40%	45%
Japan	48%	32%	52%	48%
Australia	47%	37%	40%	44%
Switzerland	45%	41%	N/A	42%
Netherlands	43%	41%	43%	36%
Great Britain	43%	33%	46%	46%
Sweden	43%	39%	39%	43%
United States	42%	41%	37%	39%
Belgium	41%	38%	39%	38%
France	41%	39%	37%	41%
Canada	40%	40%	38%	40%

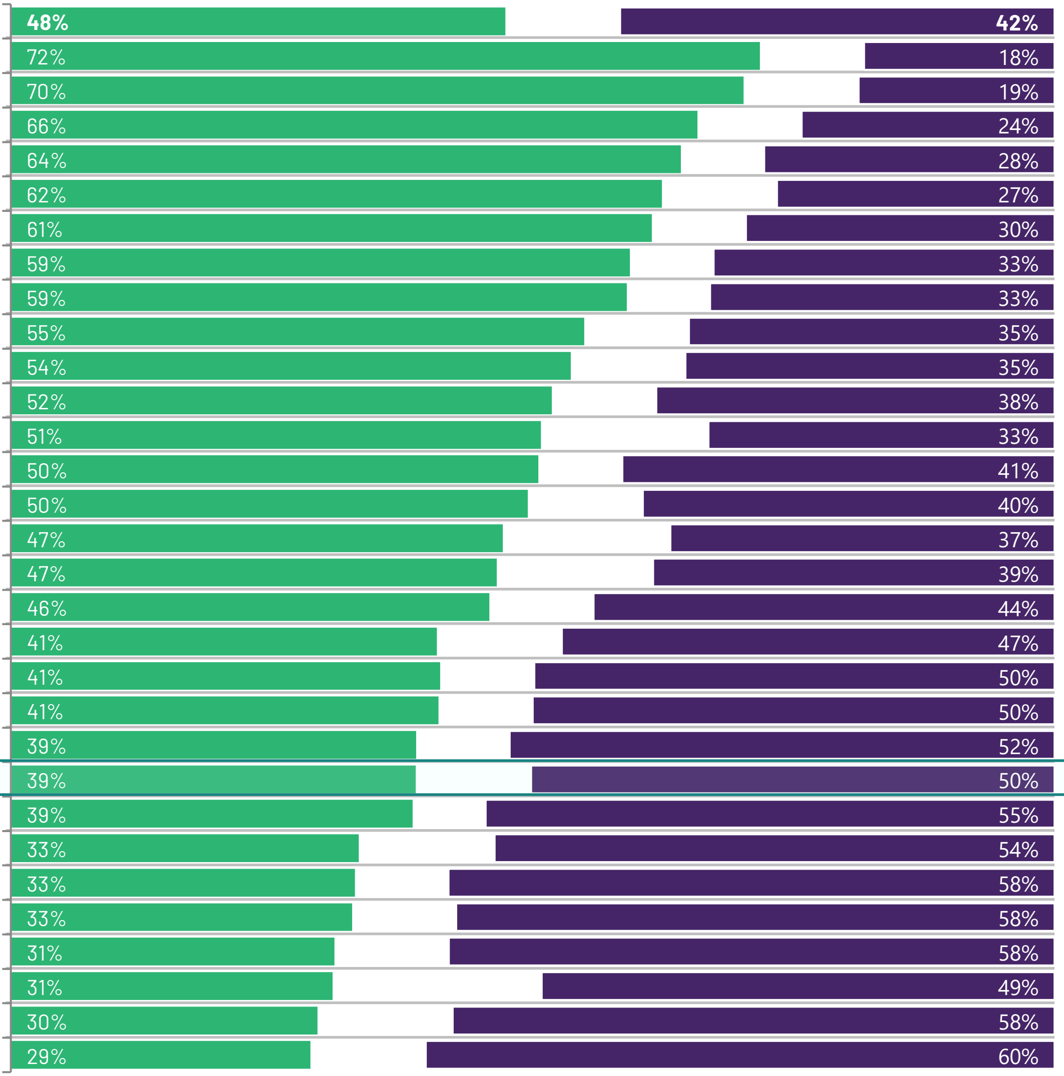
Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

AI AND TRUST



How much do you agree or disagree with the following?

I trust that companies that use artificial intelligence will protect my personal data



Country	Agree	Disagree	Agree 23	Agree 24
30-country average	**48%**	**42%**		
Indonesia	72%	18%	68%	66%
Thailand	70%	19%	72%	68%
India	66%	24%	64%	60%
Singapore	64%	28%	54%	56%
Malaysia	62%	27%	61%	52%
Peru	61%	30%	60%	62%
Mexico	59%	33%	66%	64%
South Africa	59%	33%	58%	62%
Hungary	55%	35%	60%	64%
Italy	54%	35%	59%	58%
Colombia	52%	38%	53%	50%
Poland	51%	33%	55%	45%
Chile	50%	41%	44%	43%
Spain	50%	40%	49%	48%
Brazil	47%	37%	56%	45%
Argentina	47%	39%	45%	46%
Türkiye	46%	44%	57%	46%
Belgium	41%	47%	41%	40%
Germany	41%	50%	44%	43%
Switzerland	41%	50%	N/A	43%
Netherlands	39%	52%	47%	44%
Ireland	39%	50%	38%	42%
South Korea	39%	55%	40%	37%
Great Britain	33%	54%	42%	41%
Australia	33%	58%	38%	32%
United States	33%	58%	32%	33%
France	31%	58%	32%	35%
Japan	31%	49%	32%	27%
Canada	30%	58%	34%	28%
Sweden	29%	60%	39%	35%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

How much do you agree or disagree with the following?

I trust that companies that use artificial intelligence will protect my personal data

Net agree

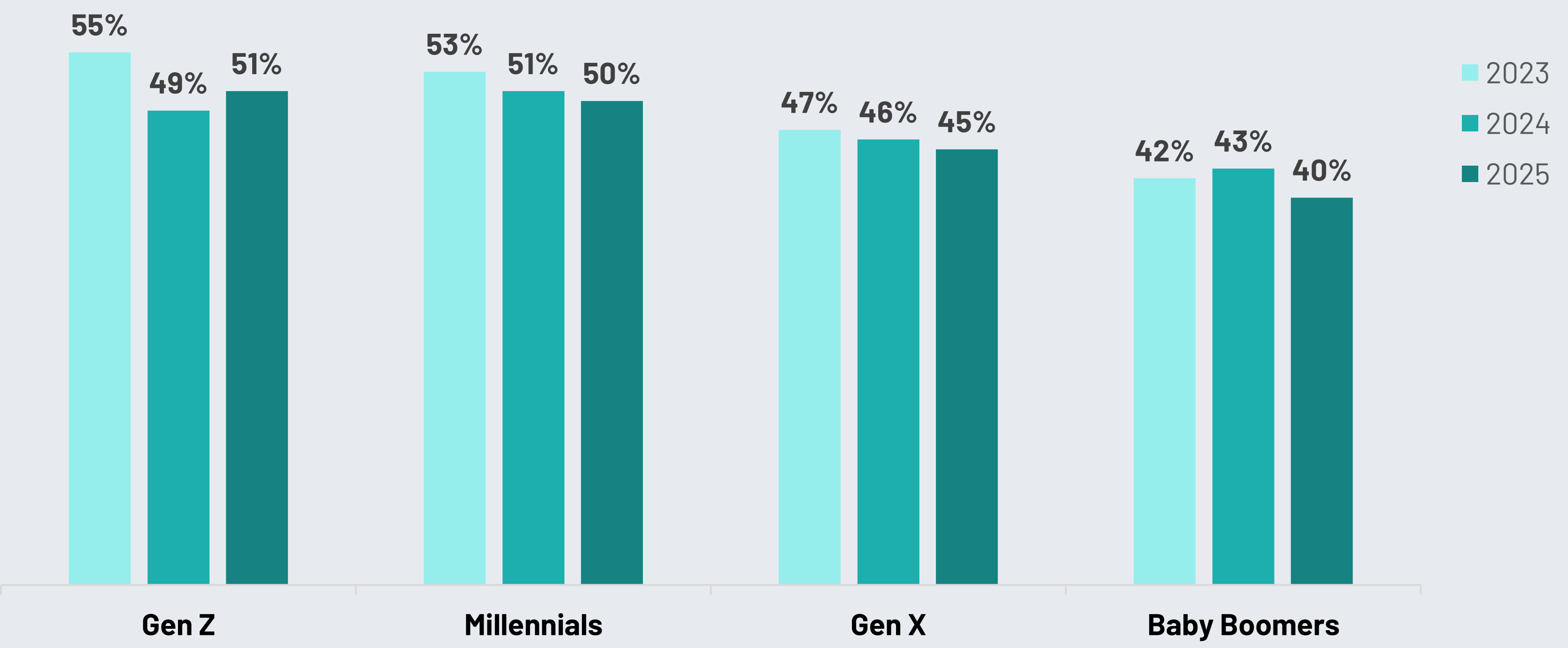
Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

How much do you agree or disagree with the following?

I trust that companies that use artificial intelligence will protect my personal data

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

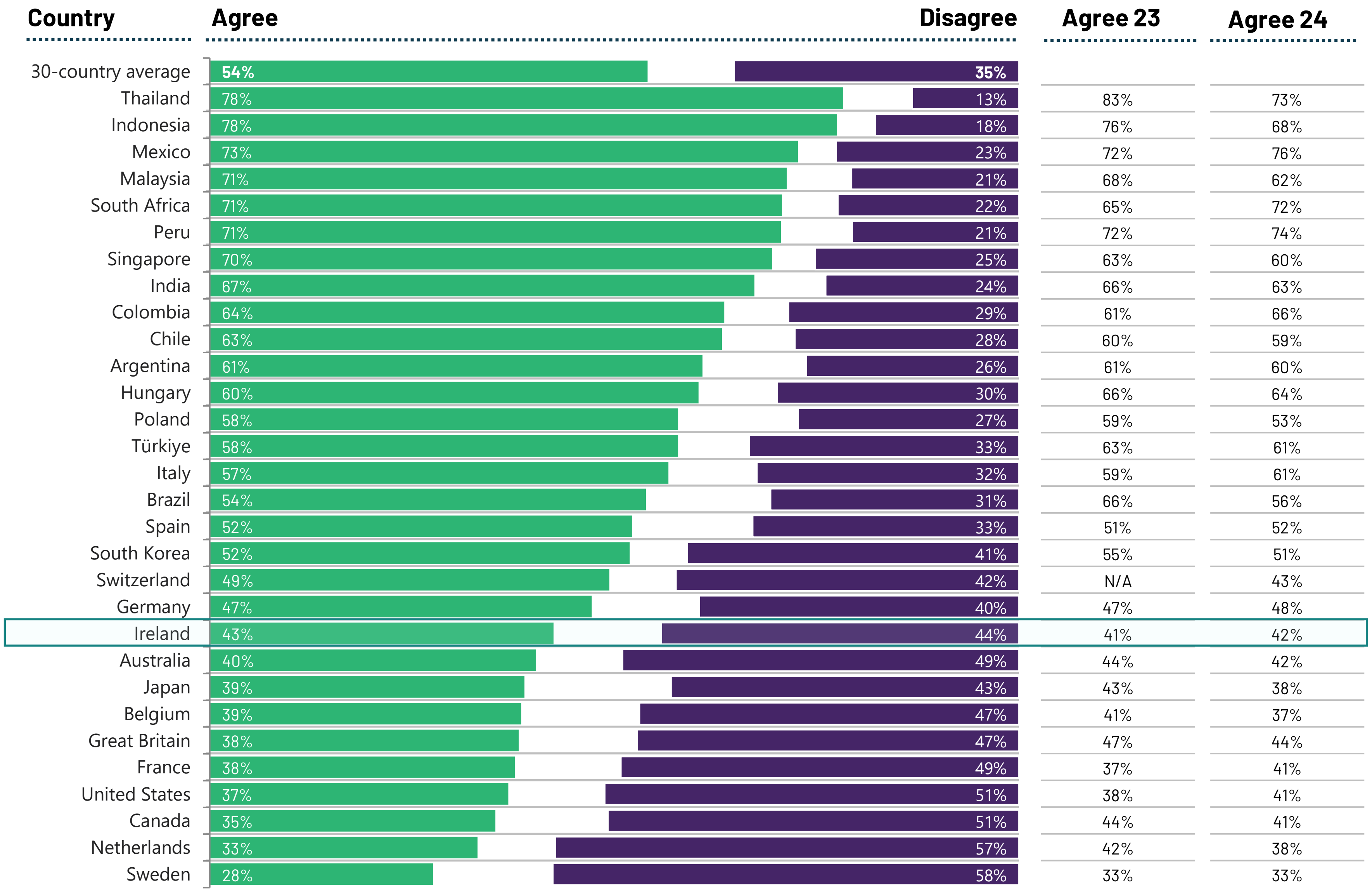
Changes across generations in recent years



	2023	2024	2025
Gen Z	55%	49%	51%
Millennials	53%	51%	50%
Gen X	47%	46%	45%
Baby Boomers	42%	43%	40%

How much do you agree or disagree with the following?

I trust artificial intelligence to not discriminate or show bias towards any group of people

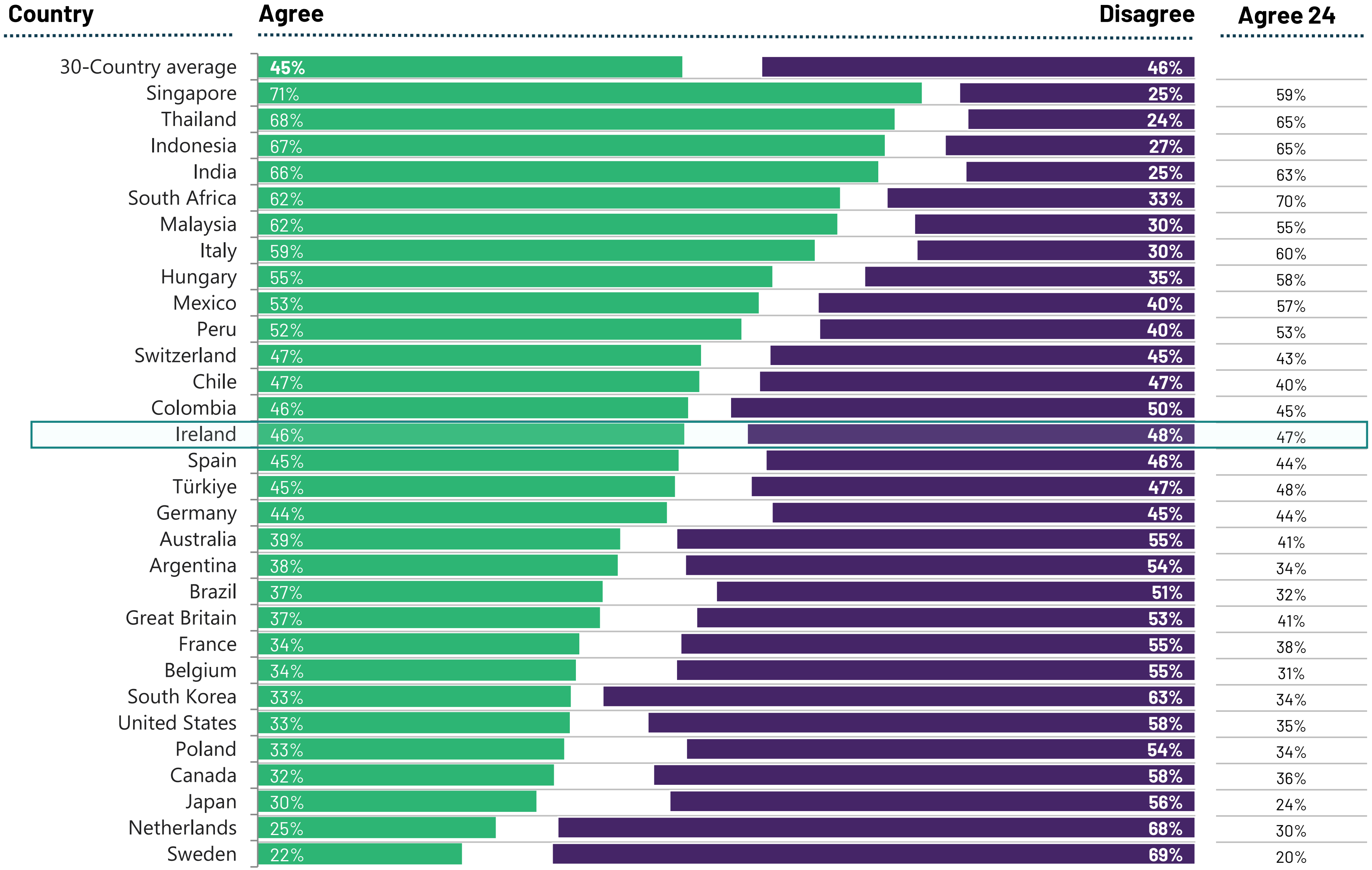


Country	Agree	Disagree	Agree 23	Agree 24
30-country average	**54%**	**35%**		
Thailand	78%	13%	83%	73%
Indonesia	78%	18%	76%	68%
Mexico	73%	23%	72%	76%
Malaysia	71%	21%	68%	62%
South Africa	71%	22%	65%	72%
Peru	71%	21%	72%	74%
Singapore	70%	25%	63%	60%
India	67%	24%	66%	63%
Colombia	64%	29%	61%	66%
Chile	63%	28%	60%	59%
Argentina	61%	26%	61%	60%
Hungary	60%	30%	66%	64%
Poland	58%	27%	59%	53%
Türkiye	58%	33%	63%	61%
Italy	57%	32%	59%	61%
Brazil	54%	31%	66%	56%
Spain	52%	33%	51%	52%
South Korea	52%	41%	55%	51%
Switzerland	49%	42%	N/A	43%
Germany	47%	40%	47%	48%
Ireland	43%	44%	41%	42%
Australia	40%	49%	44%	42%
Japan	39%	43%	43%	38%
Belgium	39%	47%	41%	37%
Great Britain	38%	47%	47%	44%
France	38%	49%	37%	41%
United States	37%	51%	38%	41%
Canada	35%	51%	44%	41%
Netherlands	33%	57%	42%	38%
Sweden	28%	58%	33%	33%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

How much do you agree or disagree with the following?

I trust people not to discriminate or show bias towards any group of people



Country	Agree	Disagree	Agree 24
30-Country average	45%	46%	
Singapore	71%	25%	59%
Thailand	68%	24%	65%
Indonesia	67%	27%	65%
India	66%	25%	63%
South Africa	62%	33%	70%
Malaysia	62%	30%	55%
Italy	59%	30%	60%
Hungary	55%	35%	58%
Mexico	53%	40%	57%
Peru	52%	40%	53%
Switzerland	47%	45%	43%
Chile	47%	47%	40%
Colombia	46%	50%	45%
Ireland	46%	48%	47%
Spain	45%	46%	44%
Türkiye	45%	47%	48%
Germany	44%	45%	44%
Australia	39%	55%	41%
Argentina	38%	54%	34%
Brazil	37%	51%	32%
Great Britain	37%	53%	41%
France	34%	55%	38%
Belgium	34%	55%	31%
South Korea	33%	63%	34%
United States	33%	58%	35%
Poland	33%	54%	34%
Canada	32%	58%	36%
Japan	30%	56%	24%
Netherlands	25%	68%	30%
Sweden	22%	69%	20%

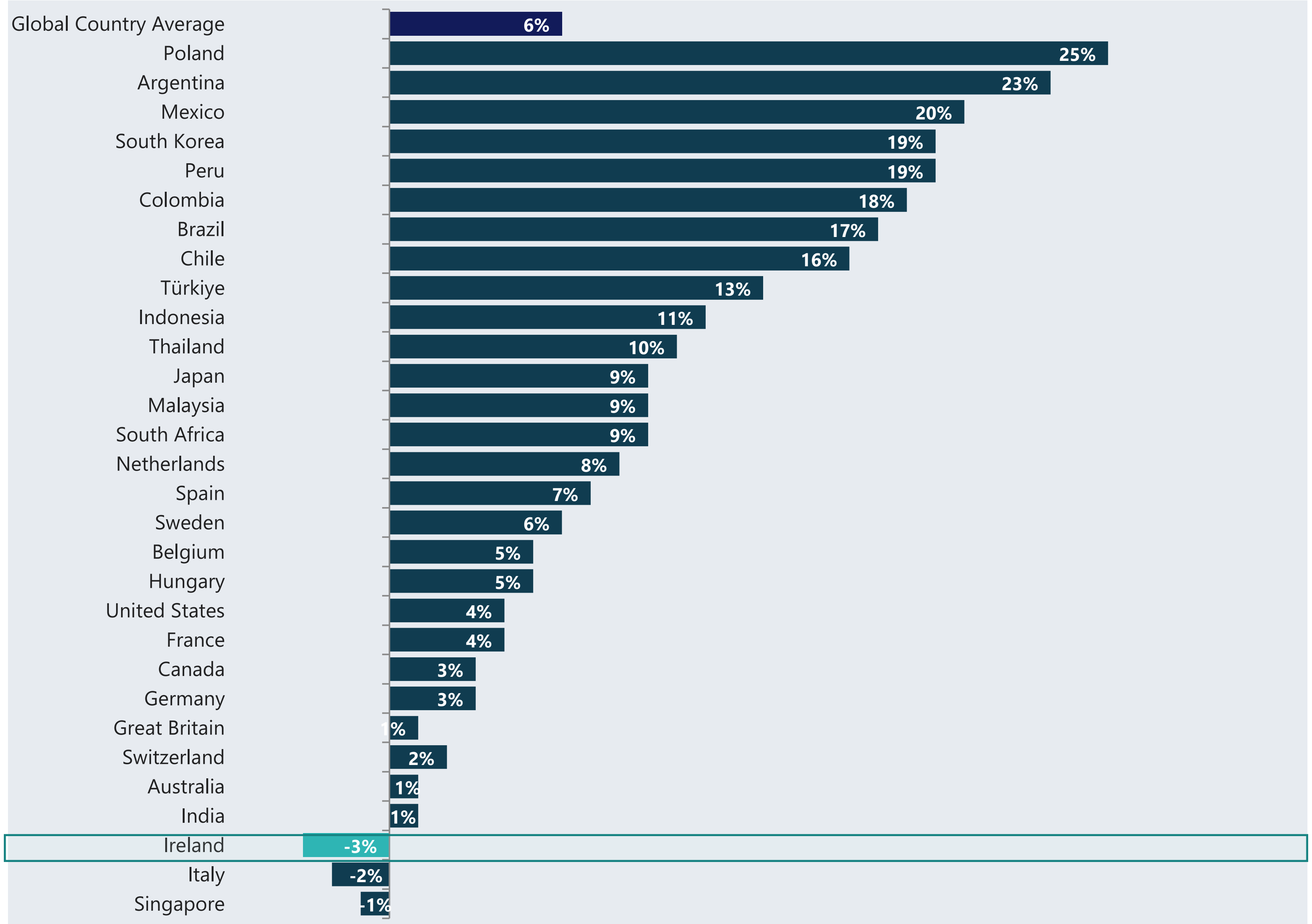
Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

% agree I trust artificial intelligence not to discriminate or show bias towards any group of people

minus

% agree I trust people not to discriminate or show bias towards any group of people

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

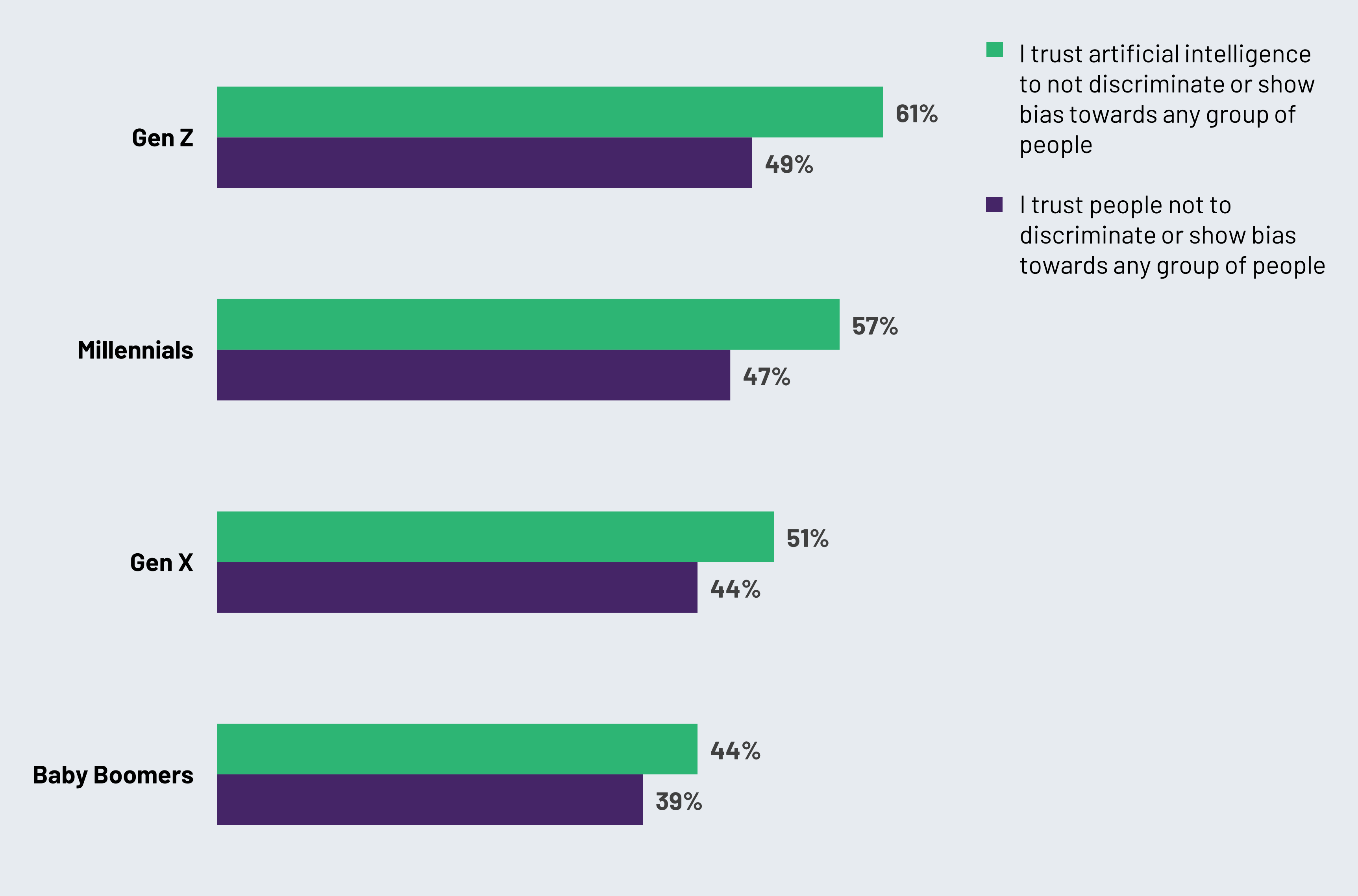


Ireland is no longer the only country trusting people more than AI, with Italy and Singapore now joining the ranks.

How much do you agree or disagree with the following?

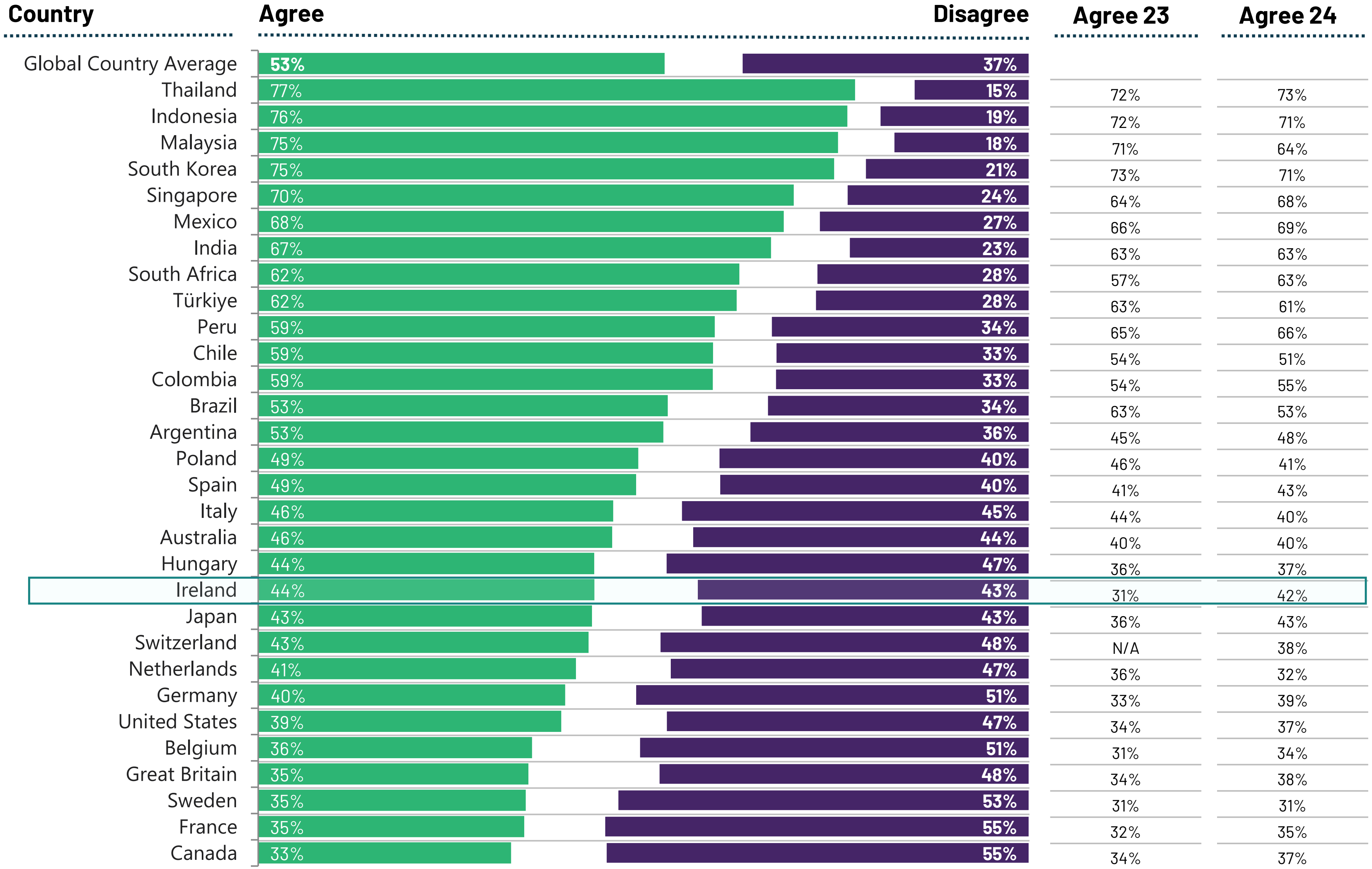
% agree

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025



AI AND THE FUTURE

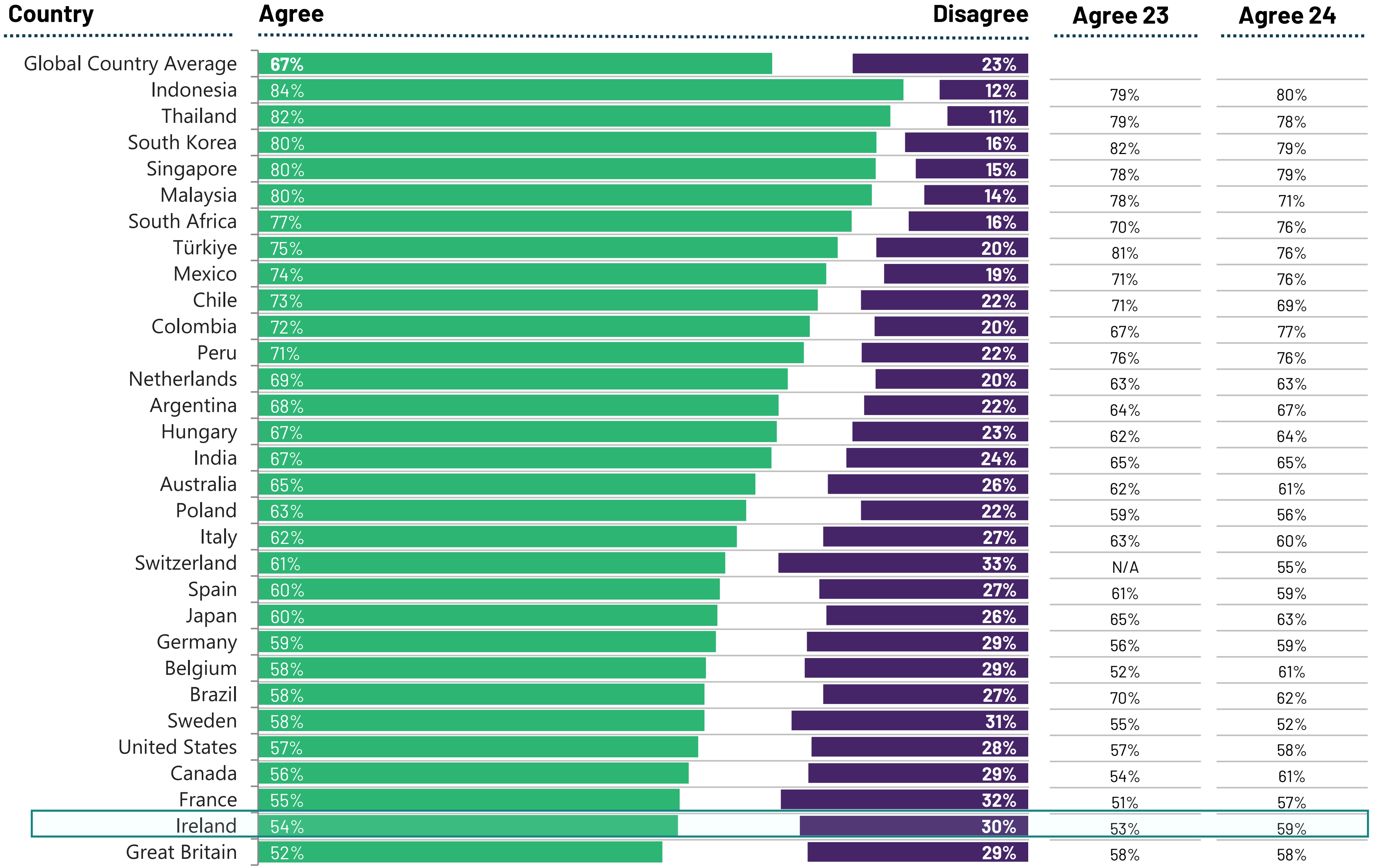
How much do you agree or disagree with the following? **Products and services using artificial intelligence have profoundly changed my daily life in the past 3-5 years**



Country	Agree	Disagree	Agree 23	Agree 24
Global Country Average	53%	37%		
Thailand	77%	15%	72%	73%
Indonesia	76%	19%	72%	71%
Malaysia	75%	18%	71%	64%
South Korea	75%	21%	73%	71%
Singapore	70%	24%	64%	68%
Mexico	68%	27%	66%	69%
India	67%	23%	63%	63%
South Africa	62%	28%	57%	63%
Türkiye	62%	28%	63%	61%
Peru	59%	34%	65%	66%
Chile	59%	33%	54%	51%
Colombia	59%	33%	54%	55%
Brazil	53%	34%	63%	53%
Argentina	53%	36%	45%	48%
Poland	49%	40%	46%	41%
Spain	49%	40%	41%	43%
Italy	46%	45%	44%	40%
Australia	46%	44%	40%	40%
Hungary	44%	47%	36%	37%
Ireland	44%	43%	31%	42%
Japan	43%	43%	36%	43%
Switzerland	43%	48%	N/A	38%
Netherlands	41%	47%	36%	32%
Germany	40%	51%	33%	39%
United States	39%	47%	34%	37%
Belgium	36%	51%	31%	34%
Great Britain	35%	48%	34%	38%
Sweden	35%	53%	31%	31%
France	35%	55%	32%	35%
Canada	33%	55%	34%	37%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

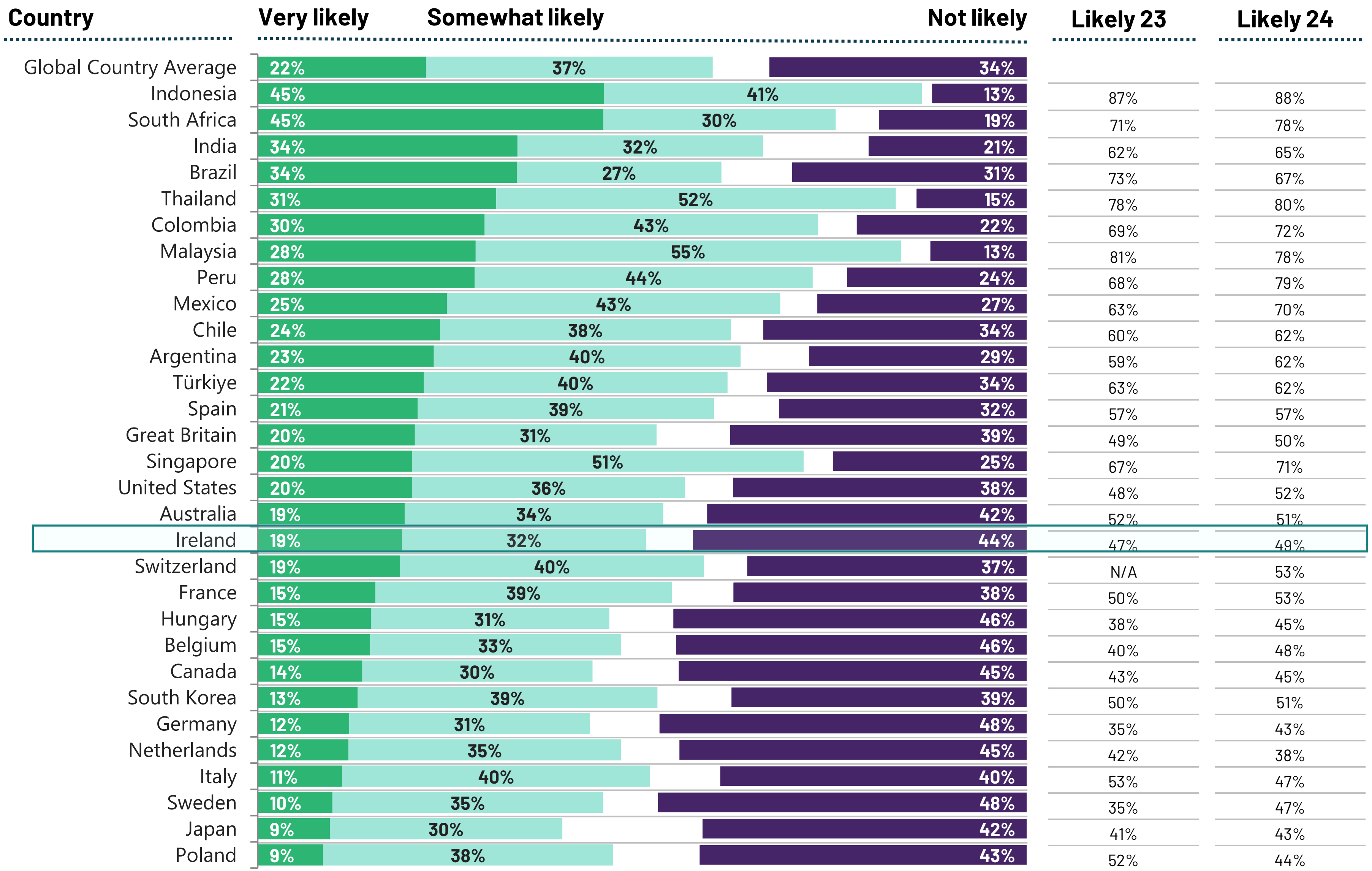
How much do you agree or disagree with the following? **Products and services using artificial intelligence will profoundly change my daily life in the next 3-5 years**



Country	Agree	Disagree	Agree 23	Agree 24
Global Country Average	67%	23%		
Indonesia	84%	12%	79%	80%
Thailand	82%	11%	79%	78%
South Korea	80%	16%	82%	79%
Singapore	80%	15%	78%	79%
Malaysia	80%	14%	78%	71%
South Africa	77%	16%	70%	76%
Türkiye	75%	20%	81%	76%
Mexico	74%	19%	71%	76%
Chile	73%	22%	71%	69%
Colombia	72%	20%	67%	77%
Peru	71%	22%	76%	76%
Netherlands	69%	20%	63%	63%
Argentina	68%	22%	64%	67%
Hungary	67%	23%	62%	64%
India	67%	24%	65%	65%
Australia	65%	26%	62%	61%
Poland	63%	22%	59%	56%
Italy	62%	27%	63%	60%
Switzerland	61%	33%	N/A	55%
Spain	60%	27%	61%	59%
Japan	60%	26%	65%	63%
Germany	59%	29%	56%	59%
Belgium	58%	29%	52%	61%
Brazil	58%	27%	70%	62%
Sweden	58%	31%	55%	52%
United States	57%	28%	57%	58%
Canada	56%	29%	54%	61%
France	55%	32%	51%	57%
Ireland	54%	30%	53%	59%
Great Britain	52%	29%	58%	58%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

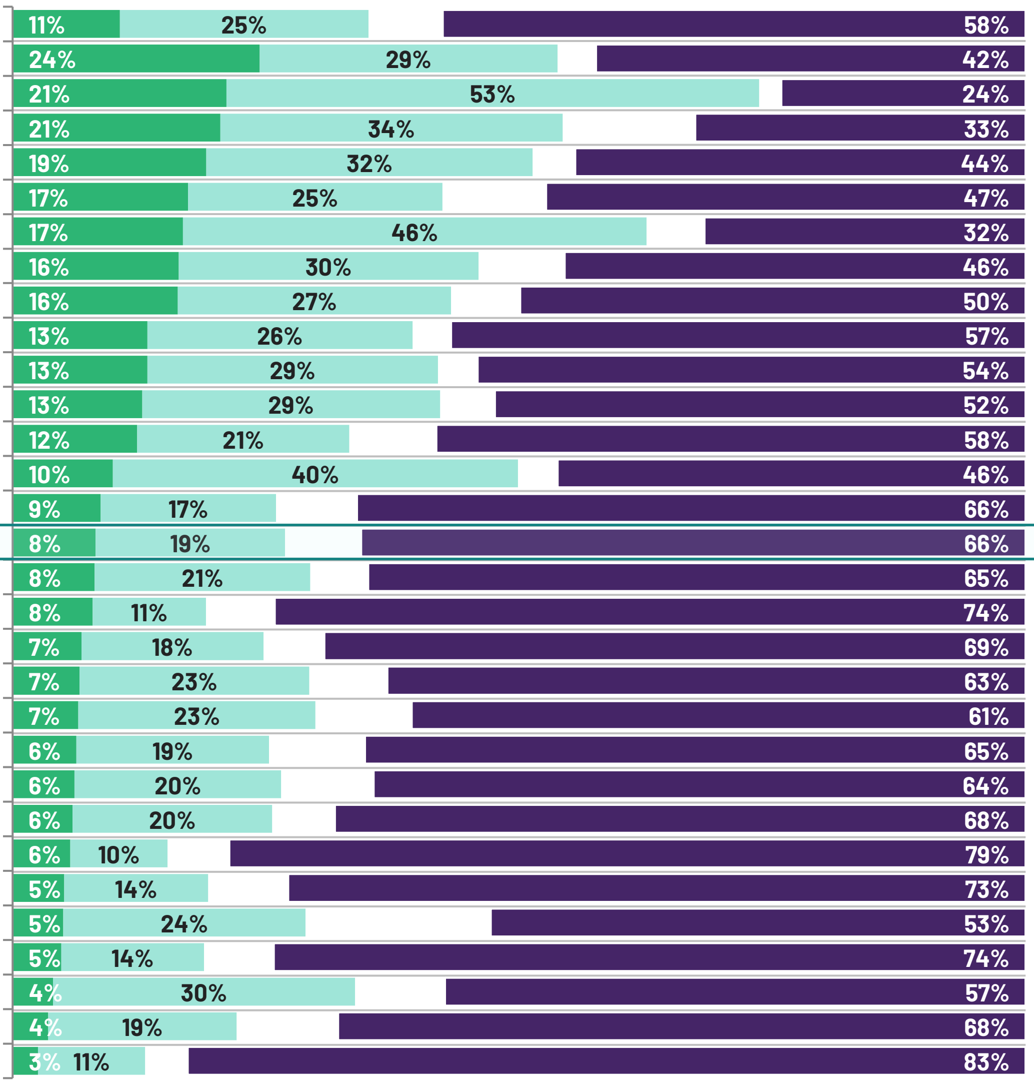
How likely, if at all, do you think it is that AI will change how you do your current job in the next five years?



Country	Very likely	Somewhat likely	Not likely	Likely 23	Likely 24
Global Country Average	22%	37%	34%		
Indonesia	45%	41%	13%	87%	88%
South Africa	45%	30%	19%	71%	78%
India	34%	32%	21%	62%	65%
Brazil	34%	27%	31%	73%	67%
Thailand	31%	52%	15%	78%	80%
Colombia	30%	43%	22%	69%	72%
Malaysia	28%	55%	13%	81%	78%
Peru	28%	44%	24%	68%	79%
Mexico	25%	43%	27%	63%	70%
Chile	24%	38%	34%	60%	62%
Argentina	23%	40%	29%	59%	62%
Türkiye	22%	40%	34%	63%	62%
Spain	21%	39%	32%	57%	57%
Great Britain	20%	31%	39%	49%	50%
Singapore	20%	51%	25%	67%	71%
United States	20%	36%	38%	48%	52%
Australia	19%	34%	42%	52%	51%
Ireland	19%	32%	44%	47%	49%
Switzerland	19%	40%	37%	N/A	53%
France	15%	39%	38%	50%	53%
Hungary	15%	31%	46%	38%	45%
Belgium	15%	33%	46%	40%	48%
Canada	14%	30%	45%	43%	45%
South Korea	13%	39%	39%	50%	51%
Germany	12%	31%	48%	35%	43%
Netherlands	12%	35%	45%	42%	38%
Italy	11%	40%	40%	53%	47%
Sweden	10%	35%	48%	35%	47%
Japan	9%	30%	42%	41%	43%
Poland	9%	38%	43%	52%	44%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

How likely, if at all, do you think it is that AI will replace your current job in the next 5 years?

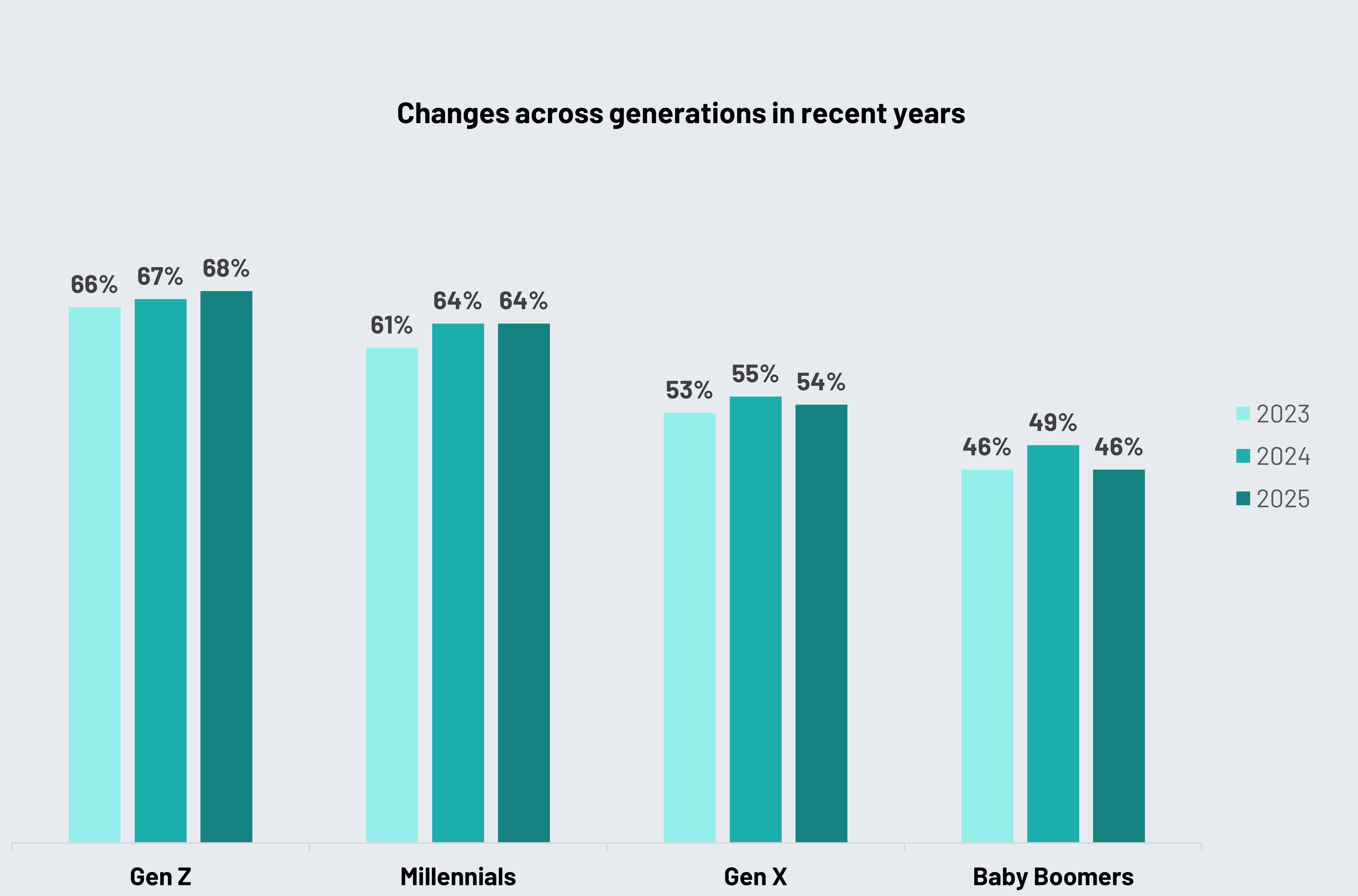


Country	Very likely	Somewhat likely	Not likely	Likely 23	Likely 24
Global Country Average	11%	25%	58%		
South Africa	24%	29%	42%	47%	53%
Thailand	21%	53%	24%	69%	68%
India	21%	34%	33%	51%	54%
Indonesia	19%	32%	44%	62%	66%
Brazil	17%	25%	47%	57%	50%
Malaysia	17%	46%	32%	62%	62%
Peru	16%	30%	46%	46%	49%
Colombia	16%	27%	50%	44%	46%
Mexico	13%	26%	57%	36%	37%
Chile	13%	29%	54%	38%	38%
Türkiye	13%	29%	52%	42%	38%
Argentina	12%	21%	58%	32%	36%
Singapore	10%	40%	46%	41%	43%
United States	9%	17%	66%	28%	24%
Ireland	8%	19%	66%	27%	27%
Switzerland	8%	21%	65%	N/A	22%
Hungary	8%	11%	74%	19%	23%
Australia	7%	18%	69%	31%	26%
Spain	7%	23%	63%	32%	31%
Italy	7%	23%	61%	31%	27%
Great Britain	6%	19%	65%	28%	28%
France	6%	20%	64%	29%	32%
Belgium	6%	20%	68%	21%	20%
Netherlands	6%	10%	79%	21%	11%
Canada	5%	14%	73%	23%	19%
Japan	5%	24%	53%	33%	35%
Germany	5%	14%	74%	19%	21%
South Korea	4%	30%	57%	31%	38%
Poland	4%	19%	68%	33%	21%
Sweden	3%	11%	83%	17%	20%

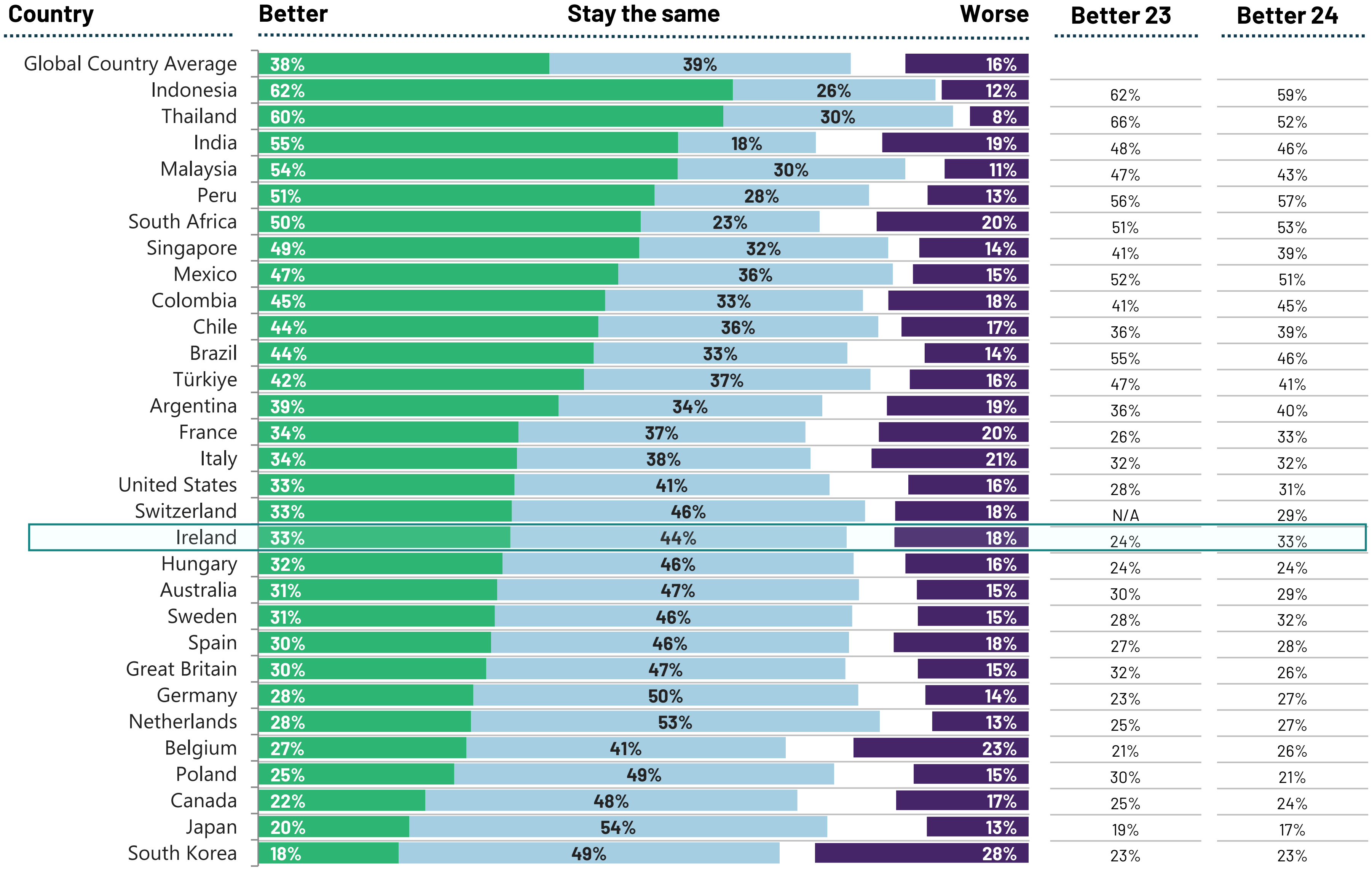
Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

How likely, if at all, do you think it is that AI will change how you do your current job in the next five years?

Base: 23,685 online adults under age 75 across 32 countries, interviewed April 19 – May 3, 2024


Changes across generations in recent years

Do you think the increased use of artificial intelligence will make the following better, worse or stay the same in the next 3-5 years? – **My job***



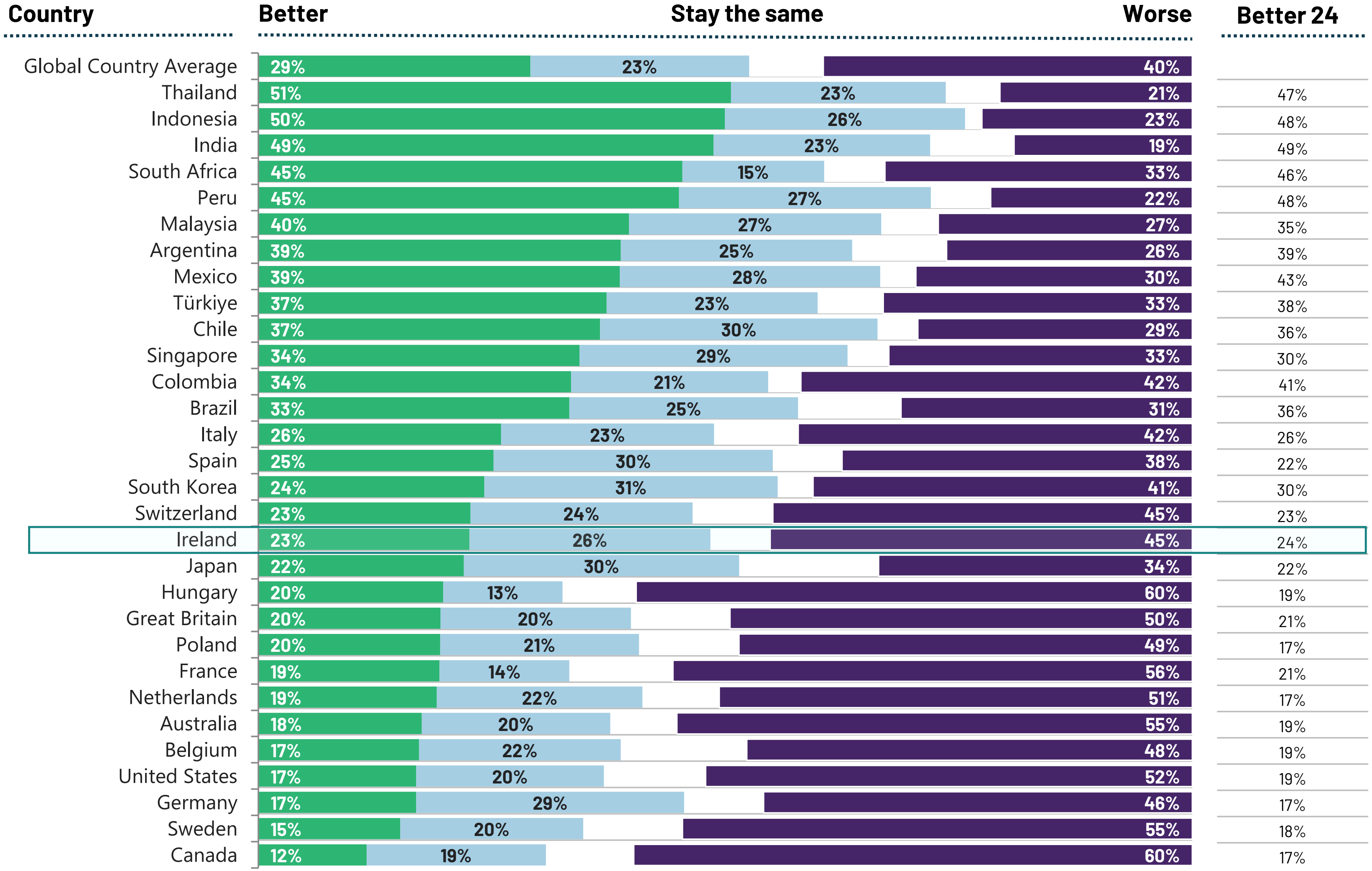
Country	Better	Stay the same	Worse	Better 23	Better 24
Global Country Average	38%	39%	16%		
Indonesia	62%	26%	12%	62%	59%
Thailand	60%	30%	8%	66%	52%
India	55%	18%	19%	48%	46%
Malaysia	54%	30%	11%	47%	43%
Peru	51%	28%	13%	56%	57%
South Africa	50%	23%	20%	51%	53%
Singapore	49%	32%	14%	41%	39%
Mexico	47%	36%	15%	52%	51%
Colombia	45%	33%	18%	41%	45%
Chile	44%	36%	17%	36%	39%
Brazil	44%	33%	14%	55%	46%
Türkiye	42%	37%	16%	47%	41%
Argentina	39%	34%	19%	36%	40%
France	34%	37%	20%	26%	33%
Italy	34%	38%	21%	32%	32%
United States	33%	41%	16%	28%	31%
Switzerland	33%	46%	18%	N/A	29%
Ireland	33%	44%	18%	24%	33%
Hungary	32%	46%	16%	24%	24%
Australia	31%	47%	15%	30%	29%
Sweden	31%	46%	15%	28%	32%
Spain	30%	46%	18%	27%	28%
Great Britain	30%	47%	15%	32%	26%
Germany	28%	50%	14%	23%	27%
Netherlands	28%	53%	13%	25%	27%
Belgium	27%	41%	23%	21%	26%
Poland	25%	49%	15%	30%	21%
Canada	22%	48%	17%	25%	24%
Japan	20%	54%	13%	19%	17%
South Korea	18%	49%	28%	23%	23%

* Only asked of those with a job

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

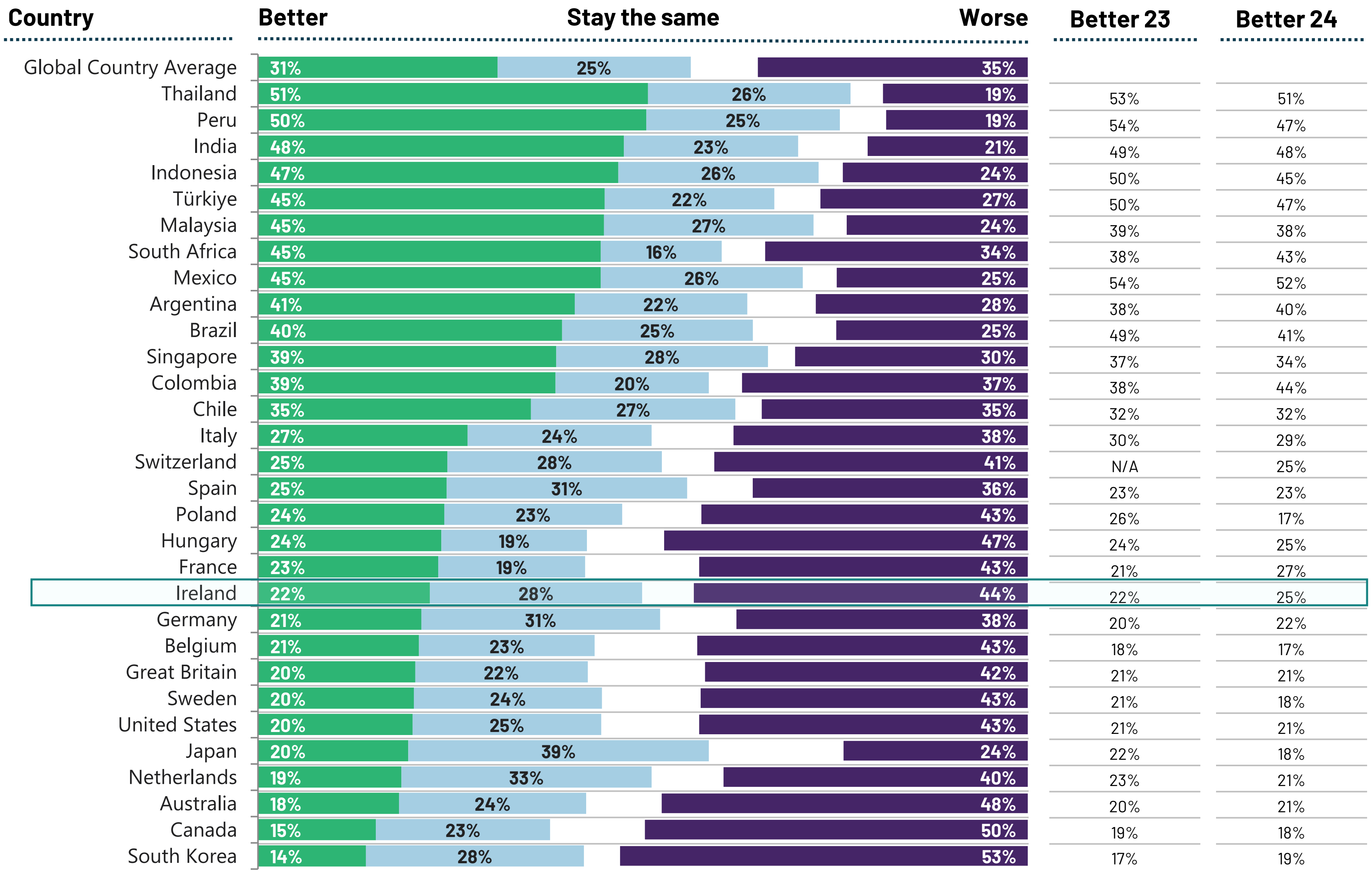
Do you think the increased use of artificial intelligence will make the following better, worse or stay the same in the next 3-5 years? – **The amount of disinformation on the internet**

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025



Country	Better	Stay the same	Worse	Better 24
Global Country Average	29%	23%	40%	
Thailand	51%	23%	21%	47%
Indonesia	50%	26%	23%	48%
India	49%	23%	19%	49%
South Africa	45%	15%	33%	46%
Peru	45%	27%	22%	48%
Malaysia	40%	27%	27%	35%
Argentina	39%	25%	26%	39%
Mexico	39%	28%	30%	43%
Türkiye	37%	23%	33%	38%
Chile	37%	30%	29%	36%
Singapore	34%	29%	33%	30%
Colombia	34%	21%	42%	41%
Brazil	33%	25%	31%	36%
Italy	26%	23%	42%	26%
Spain	25%	30%	38%	22%
South Korea	24%	31%	41%	30%
Switzerland	23%	24%	45%	23%
Ireland	23%	26%	45%	24%
Japan	22%	30%	34%	22%
Hungary	20%	13%	60%	19%
Great Britain	20%	20%	50%	21%
Poland	20%	21%	49%	17%
France	19%	14%	56%	21%
Netherlands	19%	22%	51%	17%
Australia	18%	20%	55%	19%
Belgium	17%	22%	48%	19%
United States	17%	20%	52%	19%
Germany	17%	29%	46%	17%
Sweden	15%	20%	55%	18%
Canada	12%	19%	60%	17%

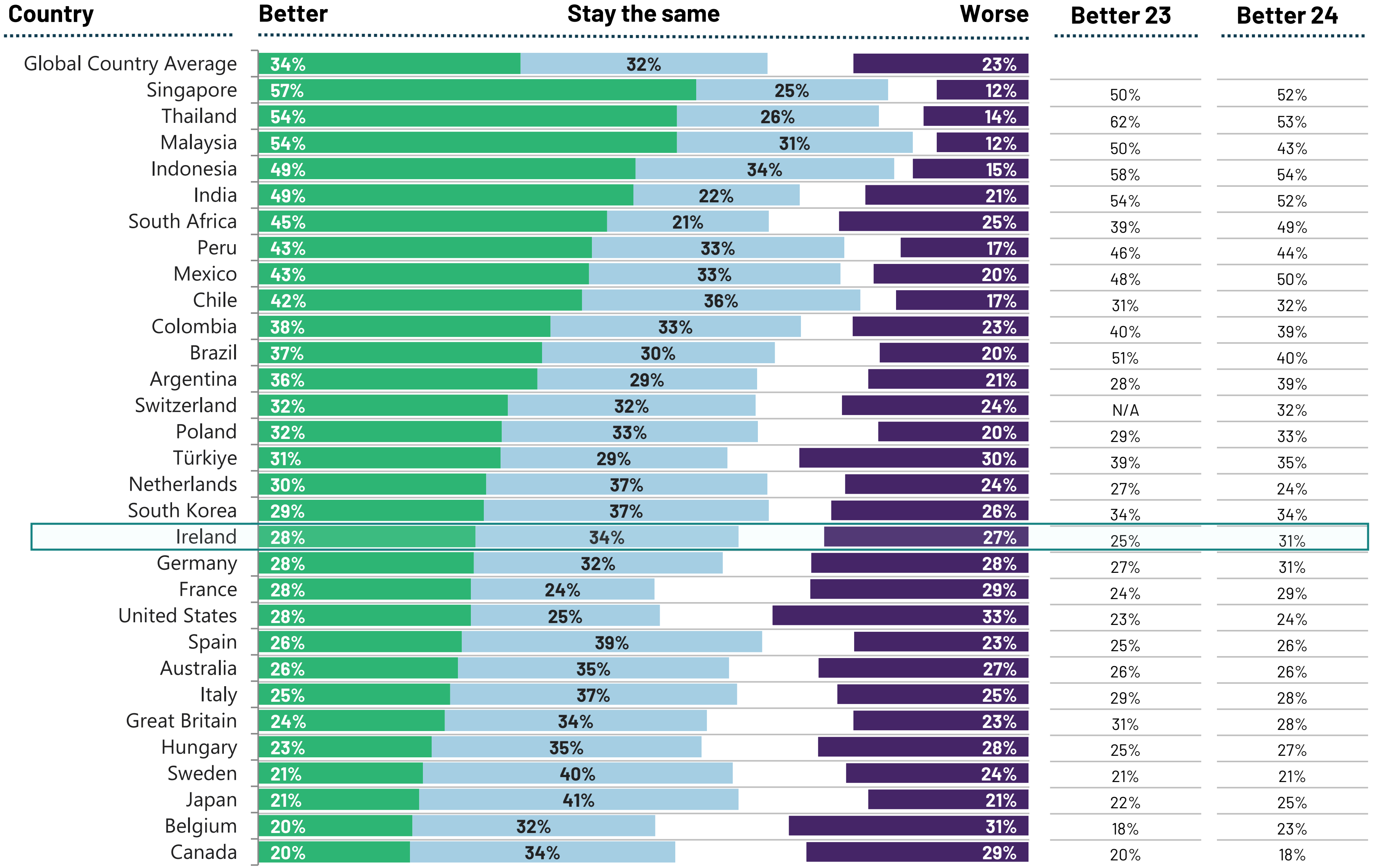
Do you think the increased use of artificial intelligence will make the following better, worse or stay the same in the next 3-5 years? - **The job market**



Country	Better	Stay the same	Worse	Better 23	Better 24
Global Country Average	31%	25%	35%		
Thailand	51%	26%	19%	53%	51%
Peru	50%	25%	19%	54%	47%
India	48%	23%	21%	49%	48%
Indonesia	47%	26%	24%	50%	45%
Türkiye	45%	22%	27%	50%	47%
Malaysia	45%	27%	24%	39%	38%
South Africa	45%	16%	34%	38%	43%
Mexico	45%	26%	25%	54%	52%
Argentina	41%	22%	28%	38%	40%
Brazil	40%	25%	25%	49%	41%
Singapore	39%	28%	30%	37%	34%
Colombia	39%	20%	37%	38%	44%
Chile	35%	27%	35%	32%	32%
Italy	27%	24%	38%	30%	29%
Switzerland	25%	28%	41%	N/A	25%
Spain	25%	31%	36%	23%	23%
Poland	24%	23%	43%	26%	17%
Hungary	24%	19%	47%	24%	25%
France	23%	19%	43%	21%	27%
Ireland	22%	28%	44%	22%	25%
Germany	21%	31%	38%	20%	22%
Belgium	21%	23%	43%	18%	17%
Great Britain	20%	22%	42%	21%	21%
Sweden	20%	24%	43%	21%	18%
United States	20%	25%	43%	21%	21%
Japan	20%	39%	24%	22%	18%
Netherlands	19%	33%	40%	23%	21%
Australia	18%	24%	48%	20%	21%
Canada	15%	23%	50%	19%	18%
South Korea	14%	28%	53%	17%	19%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

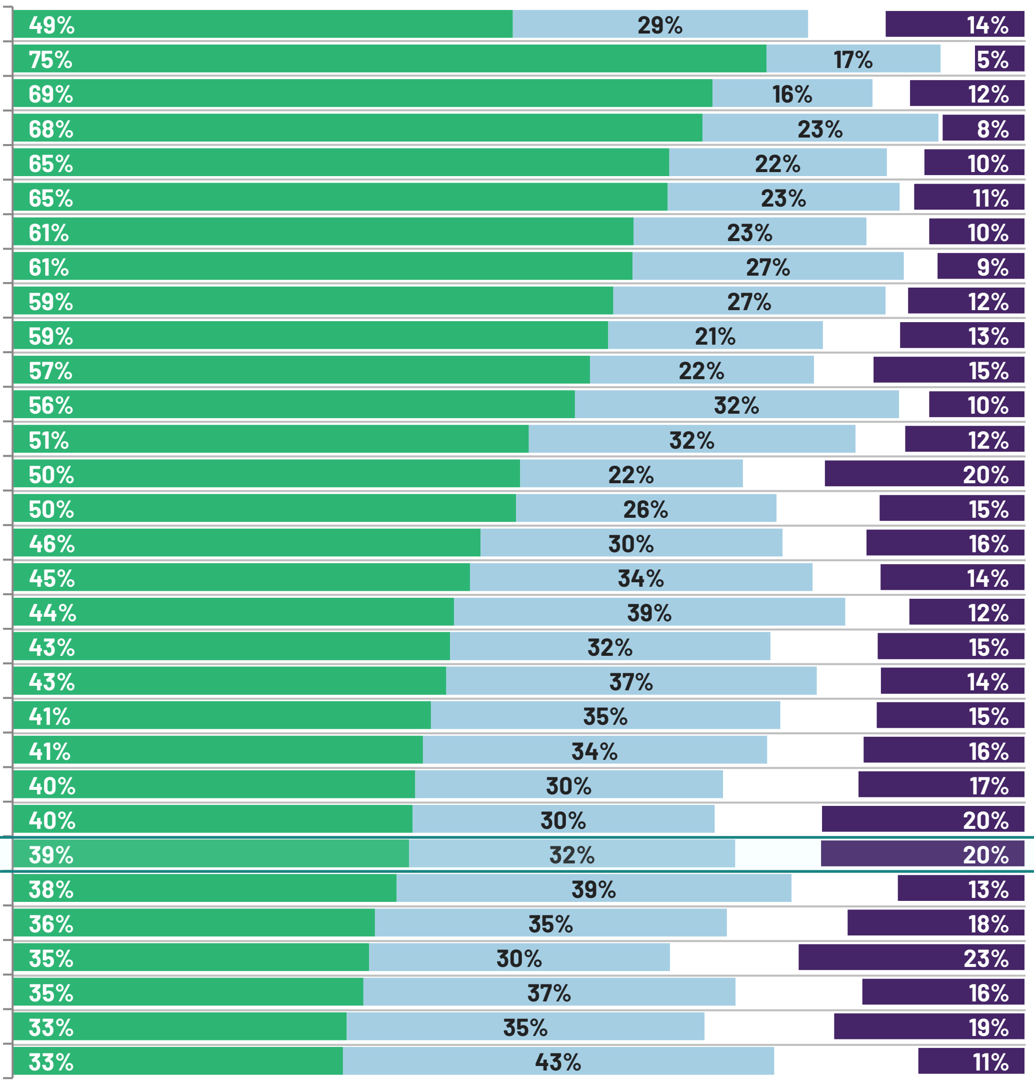
Do you think the increased use of artificial intelligence will make the following better, worse or stay the same in the next 3-5 years? - **The economy in ...**



Country	Better	Stay the same	Worse	Better 23	Better 24
Global Country Average	34%	32%	23%		
Singapore	57%	25%	12%	50%	52%
Thailand	54%	26%	14%	62%	53%
Malaysia	54%	31%	12%	50%	43%
Indonesia	49%	34%	15%	58%	54%
India	49%	22%	21%	54%	52%
South Africa	45%	21%	25%	39%	49%
Peru	43%	33%	17%	46%	44%
Mexico	43%	33%	20%	48%	50%
Chile	42%	36%	17%	31%	32%
Colombia	38%	33%	23%	40%	39%
Brazil	37%	30%	20%	51%	40%
Argentina	36%	29%	21%	28%	39%
Switzerland	32%	32%	24%	N/A	32%
Poland	32%	33%	20%	29%	33%
Türkiye	31%	29%	30%	39%	35%
Netherlands	30%	37%	24%	27%	24%
South Korea	29%	37%	26%	34%	34%
Ireland	28%	34%	27%	25%	31%
Germany	28%	32%	28%	27%	31%
France	28%	24%	29%	24%	29%
United States	28%	25%	33%	23%	24%
Spain	26%	39%	23%	25%	26%
Australia	26%	35%	27%	26%	26%
Italy	25%	37%	25%	29%	28%
Great Britain	24%	34%	23%	31%	28%
Hungary	23%	35%	28%	25%	27%
Sweden	21%	40%	24%	21%	21%
Japan	21%	41%	21%	22%	25%
Belgium	20%	32%	31%	18%	23%
Canada	20%	34%	29%	20%	18%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

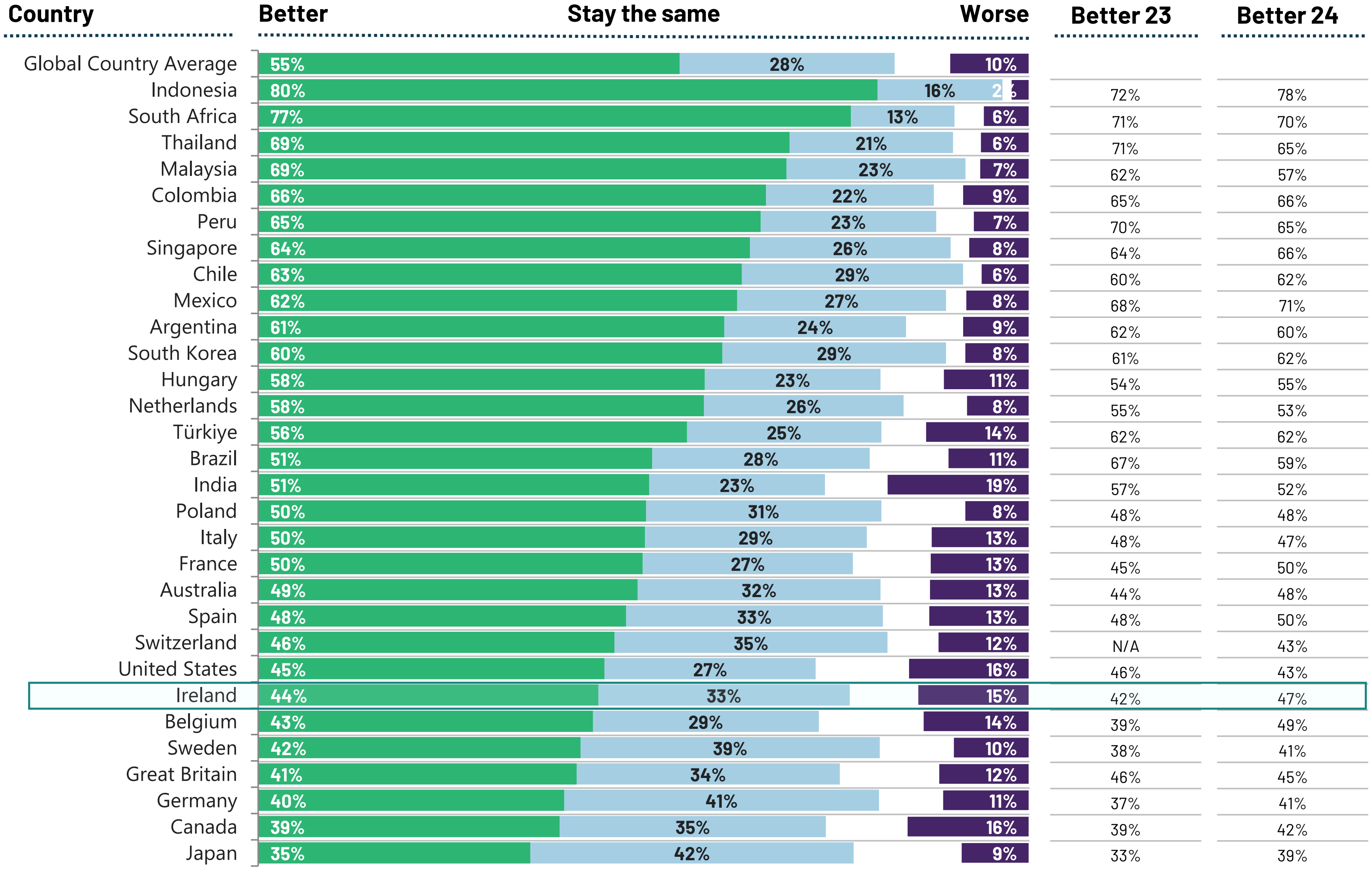
Do you think the increased use of artificial intelligence will make the following better, worse or stay the same in the next 3-5 years? - **My entertainment options (television/video content, movies, music, books)**



Country	Better	Stay the same	Worse	Better 23	Better 24
Global Country Average	49%	29%	14%		
Thailand	75%	17%	5%	68%	67%
South Africa	69%	16%	12%	66%	66%
Indonesia	68%	23%	8%	71%	64%
Mexico	65%	22%	10%	68%	69%
Colombia	65%	23%	11%	64%	67%
Peru	61%	23%	10%	71%	63%
Malaysia	61%	27%	9%	57%	53%
Chile	59%	27%	12%	63%	63%
Argentina	59%	21%	13%	63%	61%
Türkiye	57%	22%	15%	60%	60%
Singapore	56%	32%	10%	57%	58%
South Korea	51%	32%	12%	54%	51%
India	50%	22%	20%	57%	52%
Brazil	50%	26%	15%	64%	57%
Australia	46%	30%	16%	43%	45%
Spain	45%	34%	14%	51%	48%
Germany	44%	39%	12%	39%	43%
Netherlands	43%	32%	15%	50%	42%
Switzerland	43%	37%	14%	N/A	40%
Hungary	41%	35%	15%	41%	39%
Italy	41%	34%	16%	45%	44%
Great Britain	40%	30%	17%	45%	42%
United States	40%	30%	20%	40%	39%
Ireland	39%	32%	20%	44%	52%
Poland	38%	39%	13%	40%	37%
Sweden	36%	35%	18%	37%	39%
Canada	35%	30%	23%	42%	43%
Belgium	35%	37%	16%	37%	39%
France	33%	35%	19%	32%	33%
Japan	33%	43%	11%	33%	35%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

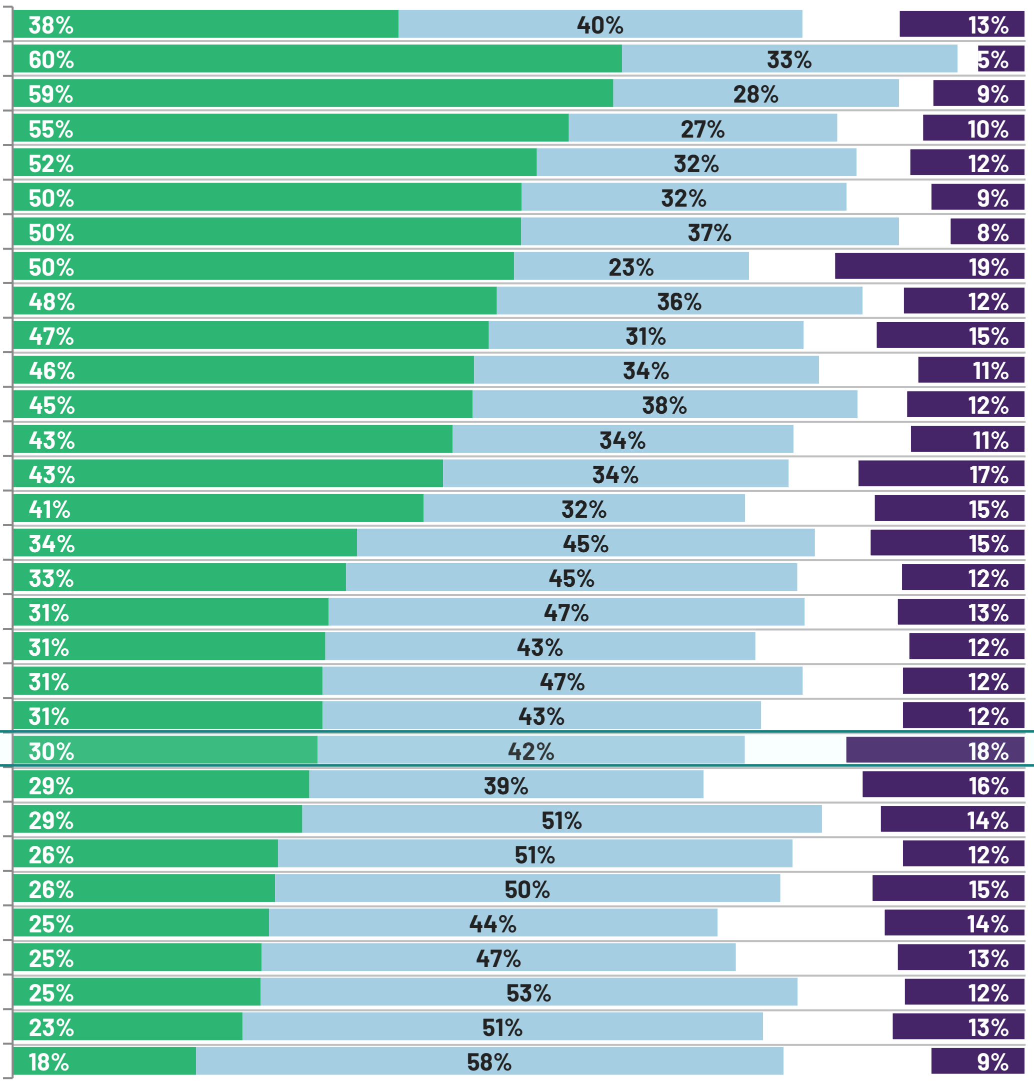
Do you think the increased use of artificial intelligence will make the following better, worse or stay the same in the next 3-5 years? - **The amount of time it takes me to get things done**



Country	Better	Stay the same	Worse	Better 23	Better 24
Global Country Average	55%	28%	10%		
Indonesia	80%	16%	2%	72%	78%
South Africa	77%	13%	6%	71%	70%
Thailand	69%	21%	6%	71%	65%
Malaysia	69%	23%	7%	62%	57%
Colombia	66%	22%	9%	65%	66%
Peru	65%	23%	7%	70%	65%
Singapore	64%	26%	8%	64%	66%
Chile	63%	29%	6%	60%	62%
Mexico	62%	27%	8%	68%	71%
Argentina	61%	24%	9%	62%	60%
South Korea	60%	29%	8%	61%	62%
Hungary	58%	23%	11%	54%	55%
Netherlands	58%	26%	8%	55%	53%
Türkiye	56%	25%	14%	62%	62%
Brazil	51%	28%	11%	67%	59%
India	51%	23%	19%	57%	52%
Poland	50%	31%	8%	48%	48%
Italy	50%	29%	13%	48%	47%
France	50%	27%	13%	45%	50%
Australia	49%	32%	13%	44%	48%
Spain	48%	33%	13%	48%	50%
Switzerland	46%	35%	12%	N/A	43%
United States	45%	27%	16%	46%	43%
Ireland	44%	33%	15%	42%	47%
Belgium	43%	29%	14%	39%	49%
Sweden	42%	39%	10%	38%	41%
Great Britain	41%	34%	12%	46%	45%
Germany	40%	41%	11%	37%	41%
Canada	39%	35%	16%	39%	42%
Japan	35%	42%	9%	33%	39%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

Do you think the increased use of artificial intelligence will make the following better, worse or stay the same in the next 3-5 years? – **My health**



Country	Better	Stay the same	Worse	Better 23	Better 24
Global Country Average	38%	40%	13%		
Indonesia	60%	33%	5%	58%	51%
Thailand	59%	28%	9%	56%	51%
South Africa	55%	27%	10%	49%	49%
Mexico	52%	32%	12%	61%	56%
Peru	50%	32%	9%	55%	57%
Malaysia	50%	37%	8%	49%	43%
India	50%	23%	19%	50%	51%
Chile	48%	36%	12%	47%	45%
Colombia	47%	31%	15%	50%	49%
Argentina	46%	34%	11%	47%	49%
Singapore	45%	38%	12%	40%	41%
Brazil	43%	34%	11%	55%	44%
Türkiye	43%	34%	17%	47%	43%
France	41%	32%	15%	37%	39%
South Korea	34%	45%	15%	38%	35%
Italy	33%	45%	12%	37%	38%
Spain	31%	47%	13%	33%	33%
Great Britain	31%	43%	12%	33%	30%
Australia	31%	47%	12%	29%	29%
United States	31%	43%	12%	32%	28%
Ireland	30%	42%	18%	29%	35%
Belgium	29%	39%	16%	28%	34%
Switzerland	29%	51%	14%	N/A	30%
Hungary	26%	51%	12%	28%	31%
Germany	26%	50%	15%	25%	27%
Poland	25%	44%	14%	23%	24%
Canada	25%	47%	13%	29%	24%
Netherlands	25%	53%	12%	30%	25%
Sweden	23%	51%	13%	25%	21%
Japan	18%	58%	9%	16%	19%

Base: 23,216 online adults under age 75 across 30 countries, interviewed March 21 – April 4, 2025

AFTER STEADY GROWTH, DIGITAL FINANCE AND DEVICE OWNERSHIP LEVELLING OFF

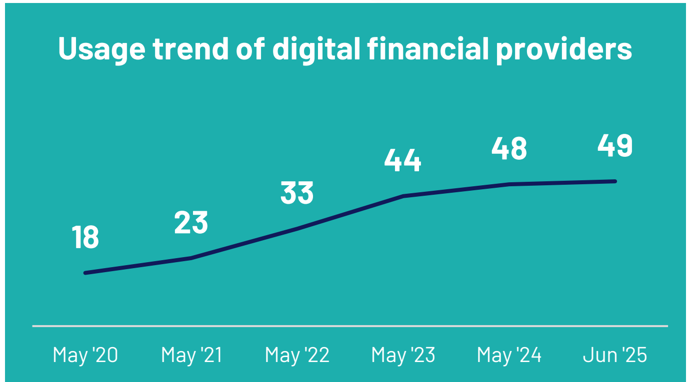
After steady growth since 2020, use of digital financial providers plateaus

49%

of Pop.

now use digital financial providers in Ireland

(e.g. Revolut, N26, Monzo)


Usage trend of digital financial providers

Region

Dublin	Outside Dublin
55%	46%
(55%)	(45%)

Social class

ABC1	C2DE
60%	40%
(59%)	(37%)

Driven by middle class and Dubliners, but growing outside these traditional cohorts

Generations

Gen Z	63%	(64%)
Millennials	63%	(60%)
Gen X	51%	(55%)
Baby Boomers	20%	(22%)
Silent Gen	-	(-)

() = 2024 data

○ = Significantly higher □ = Significantly lower

49%

(49% in 2024)

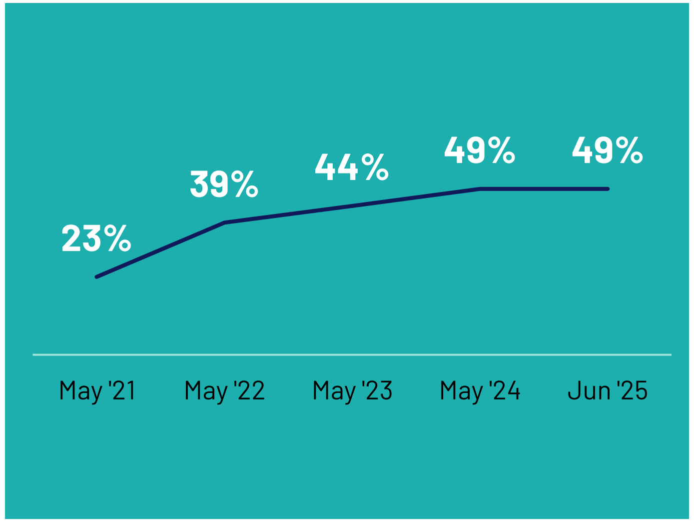
of all adults made a contactless mobile payment in store using a digital wallet (e.g., using a mobile phone, a smartwatch, etc., rather than using a physical bank card).

Across demographics, no significant shift seen in the use of contactless mobile payment– the first year since 2020 not to grow.

Ever do nowadays

Who is ever using?	
Under 50	62% (64%)
Over 50	29% (28%)
ABC1	58% (59%)
C2DE	43% (41%)
Dublin	52% (53%)
Outside Dublin	47% (48%)

() = 2024 data



Base: all Adults 16+ - 1,005

5%

(7% in 2024)

owned/held, bought, or paid with cryptocurrency (e.g., Bitcoin, Ethereum, Litecoin, etc.)

Engagement with cryptocurrency experiencing some softening compared to 2024. Younger generations and the middle class continue to show higher usage

Ever do nowadays

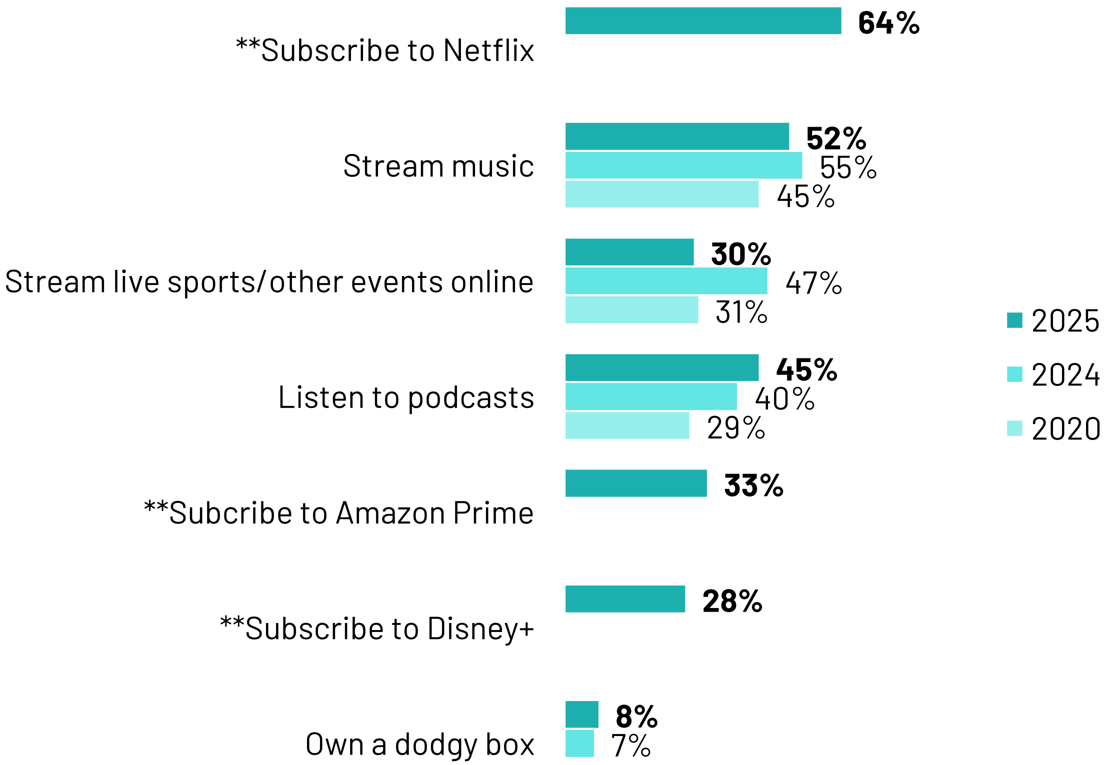
Who is dabbling?	
Under 35	16% (18%)
ABC1	9% (11%)
C2DE	3% (4%)

Base: all Adults 16+ - 1005

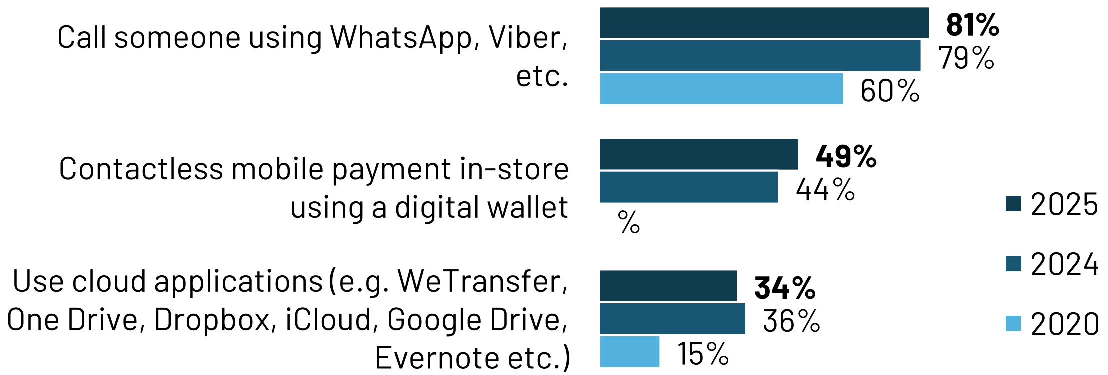
A lot has happened in the last four years: Highlights

Podcast listenership has grown substantially, Netflix continuing to lead streaming services, cloud application and communication apps have grown substantially.

Growing in streaming



Comms, storage and payment behaviour also changing



**Watch Netflix
**Watch Amazon Prime
**Watch Disney+
changed to subscribe to … in 2025

Skype removed in 2025
Dodgy box added 2024

Base: All adults 16+ - 1,005

Free On Demand entertainment growing in popularity with YouTube and podcasts each increasing, live events and streaming platform viewership declining

*Those with both Netflix & Amazon Prime = 67% (75%) (so Netflix is dominant with Amazon seen as an add on)

Entertainment

76% (72%)
Watch or listen to content on YouTube

****64% (73%)**
Subscribe to Netflix **(73% Watch Netflix)*

52% (55%)
Stream music, via Spotify, YouTube, etc

46% (47%)
Use catch-up TV services like RTE Player, TV3 Player, All4, Virgin and Sky On Demand etc on mobile/laptop/TV or other devices

45% (40%)
Listen to Podcasts

****33% (37%)**
Subscribe to Amazon Prime (37% Watch Amazon Prime)

30% (37%)
Watch or stream live sports or other events online

****28% (32%)**
Subscribe to Disney+ *(32% Watch Disney+)*

19% (24%)
*Watch an online streaming service such as Twitch, YouTube Gaming

17% (20%)
Play Games online with others

****10% (14%)**
Subscribe to AppleTV *(14% Watch Apple TV)*

10% (13%)
Watch/stream movies/shows etc. via sites such as Showbox, etc.

****10% (13%)**
Subscribe to Paramount+ *(13% Watch Paramount+*

8% (7%)
Own a 'dodgy box'

76%
ANY Paid Streaming

Communications

83% (85%)
Use personal email

81% (79%)
Call someone using WhatsApp, Viber, etc.

77% (79%)
use instant messaging - WhatsApp, Facebook Messenger, Snapchat, Viber, Discord, Skype etc.)

74% (75%)
Online banking (e.g. your banking website app or login to their website)

49% (48%)
Digital financial products/banks such as Revolut, N26, Monzo

42% (42%)
Use video calling/conferencing (e.g. Zoom, Microsoft Teams, Facetime, etc.)

34% (36%)
Use cloud applications (e.g. WeTransfer, One Drive, Dropbox, iCloud, Google Drive, Evernote etc.)

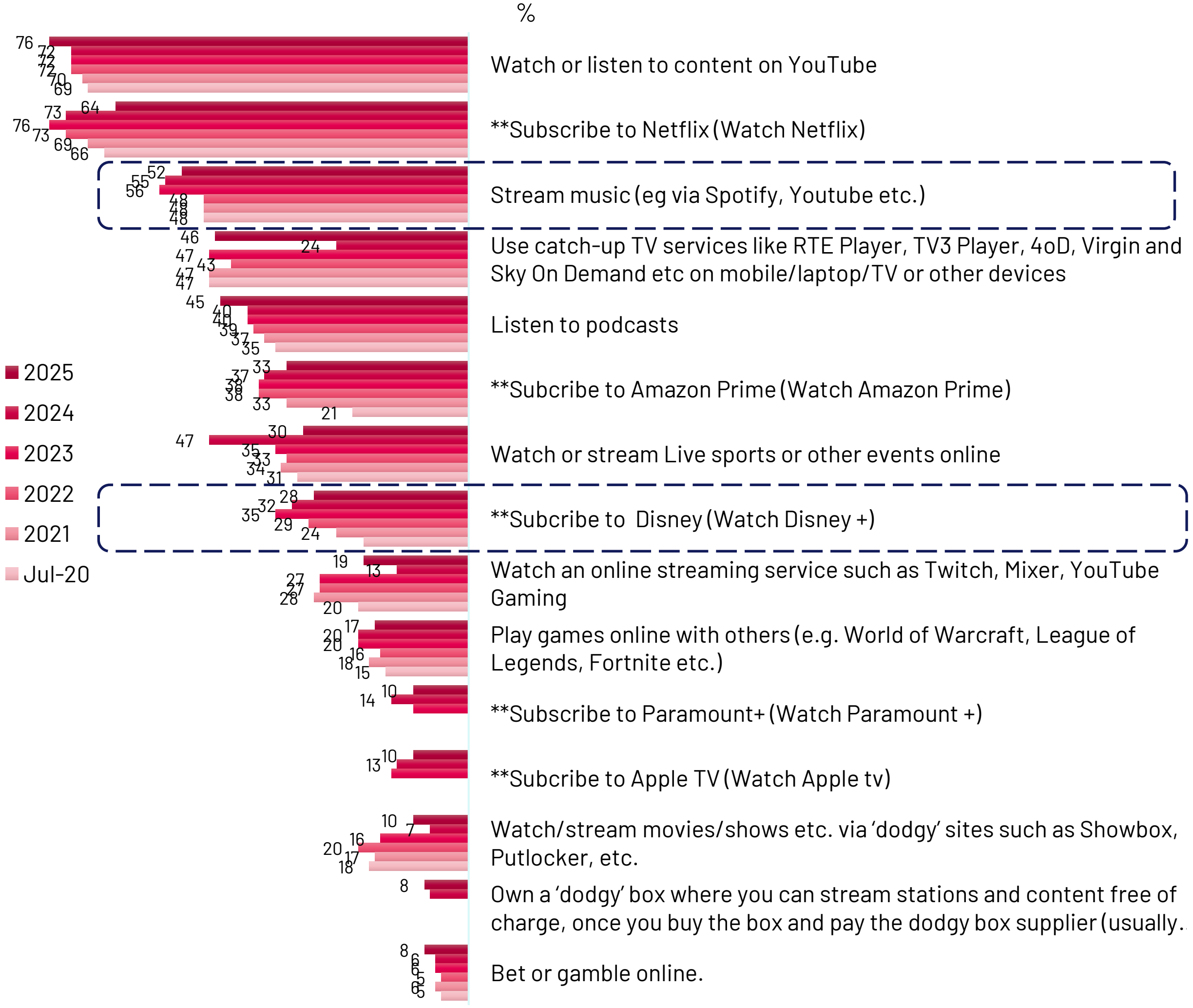
Base: All adults 16+ - 1,005
Q.3 Which of these do you do nowadays anywhere ...

** = statement wording changed 2025
( ) = 2024 data

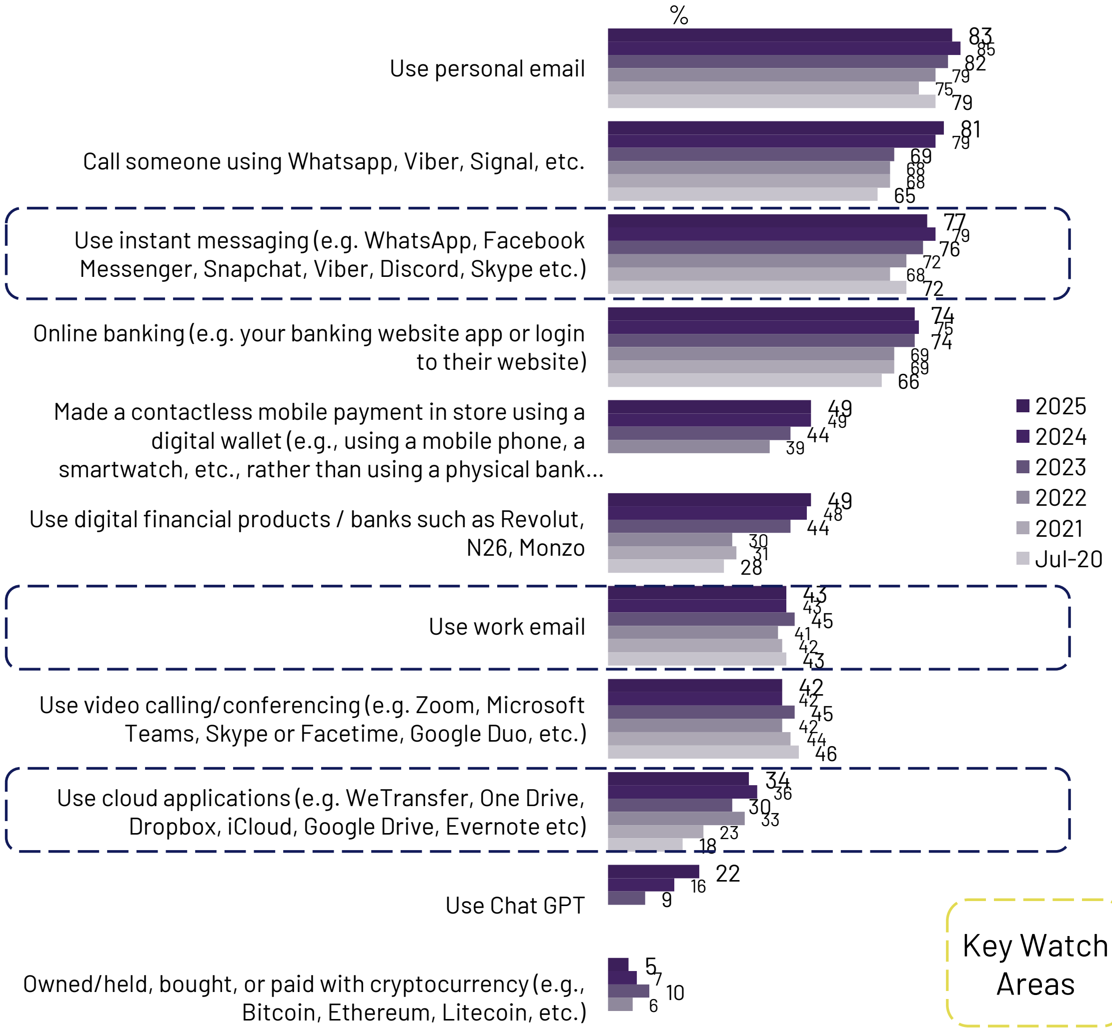
Online services we are using nowadays - Trended

Subscription entertainment seeing decline since last year, with free and on demand options increasing instead. ChatGPT usage showing notable increase

Entertainment



Communications



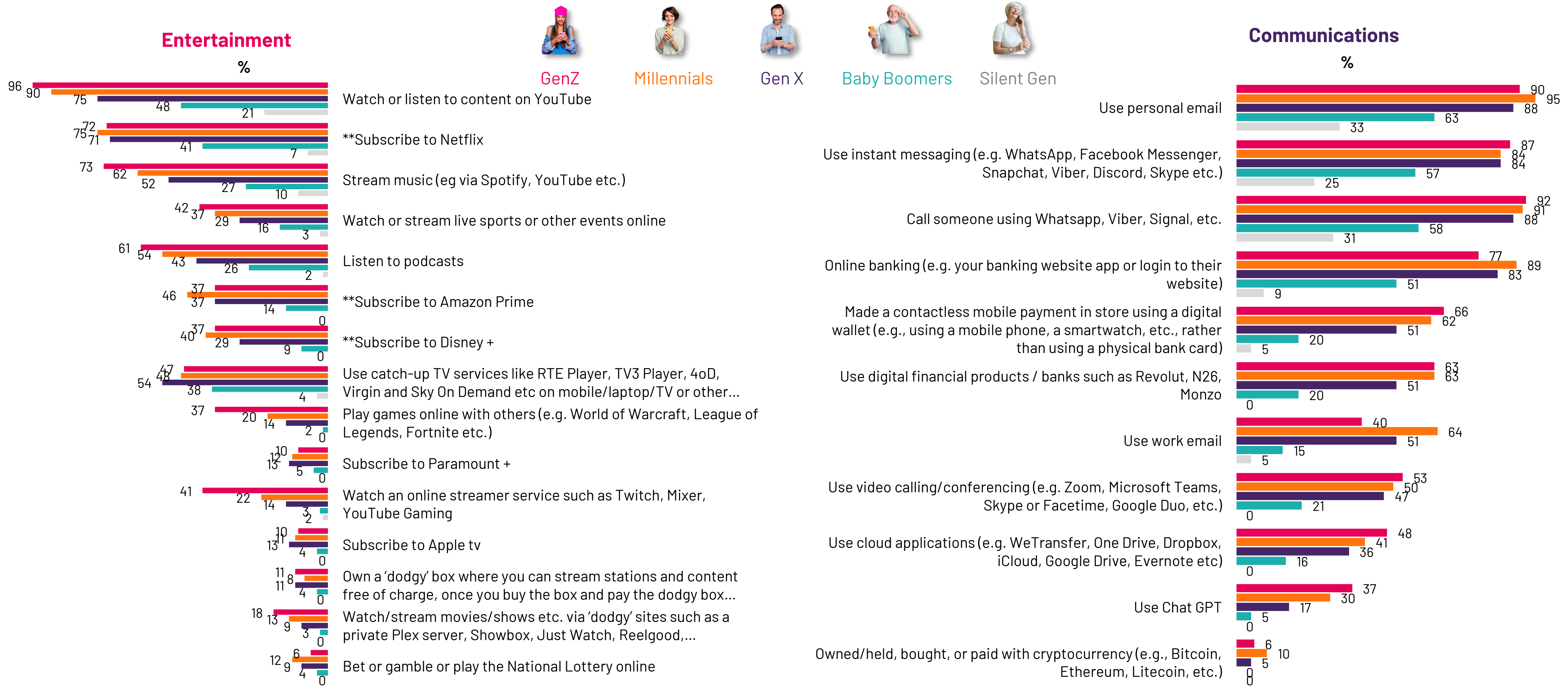
Key Watch Areas

Base: All adults 16+ - 1,005
Q.3 Which of these do you do nowadays anywhere ...

Disney+ added July 2020
Dodgy box added 2024
** = statement changed 2025

Online services we are using nowadays x Generations

Gen Z and Millennials greatly favouring YouTube, podcasts, music streaming and streaming platforms such as Twitch over other generations



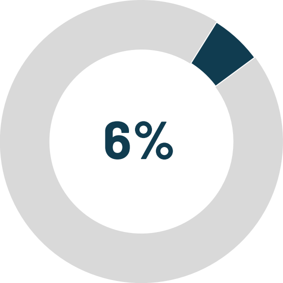
Base: All adults 16+ - 1,005
Q.3 Which of these do you do nowadays anywhere ...

** = statement changed 2025

YouTube services we are using nowadays

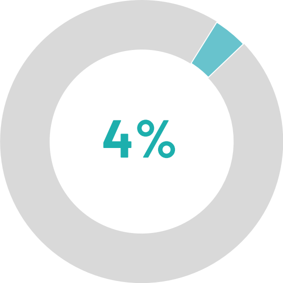
Gen Z and Millennials primarily driving paid engagement with YouTube as a platform

Subscribe to YouTube premium



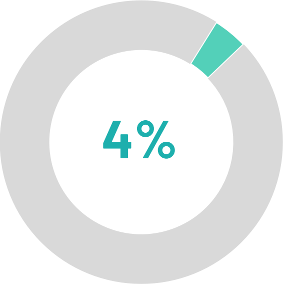
GenZ	9%
Millennials	9%
Gen X	5%
Baby Boomers	2%
Silent Gen	0%

Pay a subscription to a specific YouTube channel (as opposed to a YouTube Premium subscription)



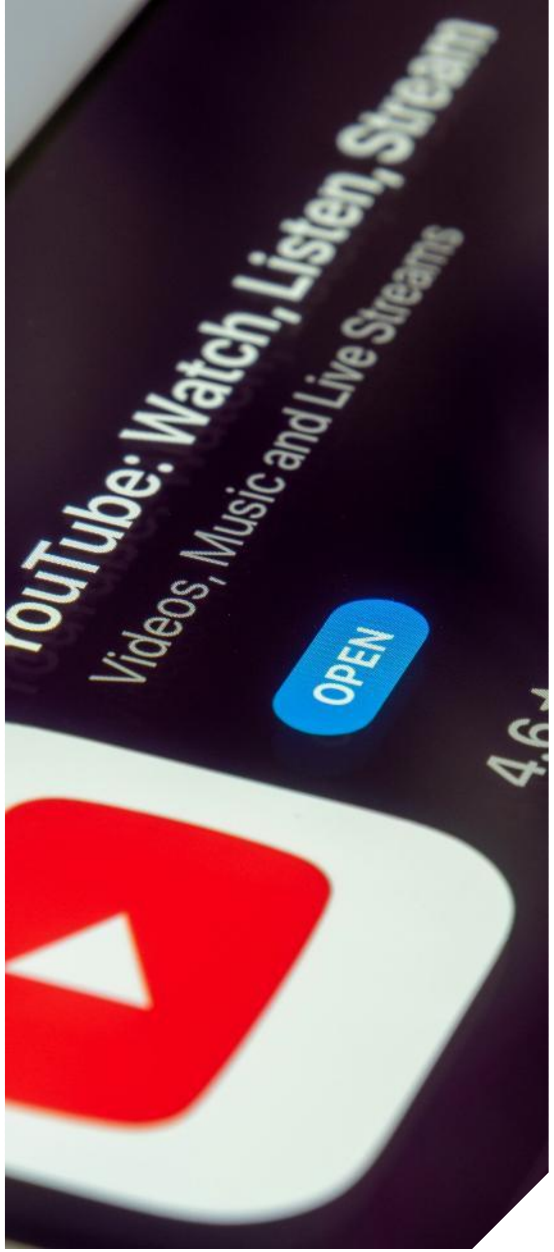
GenZ	7%
Millennials	4%
Gen X	3%
Baby Boomers	1%
Silent Gen	0%

Pay a YouTube Premium subscription (as opposed to a subscription to a specific channel)



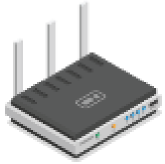
GenZ	8%
Millennials	4%
Gen X	3%
Baby Boomers	2%
Silent Gen	0%

YouTube New statements added 2025



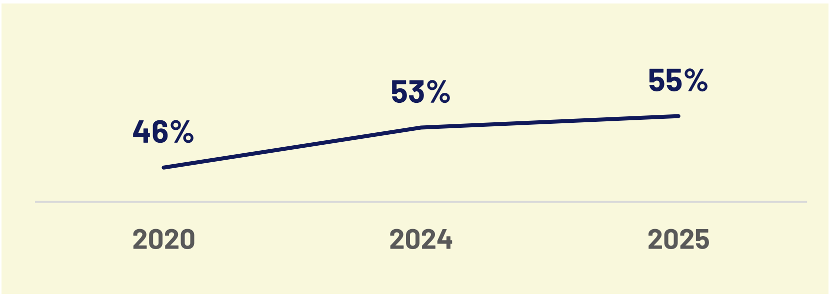
BROADBAND VIEWED AS AN ESSENTIAL UTILITY

Valuation of broadband vs. television continues to grow. YouTube viewership driven predominantly by Gen Z and Millennials

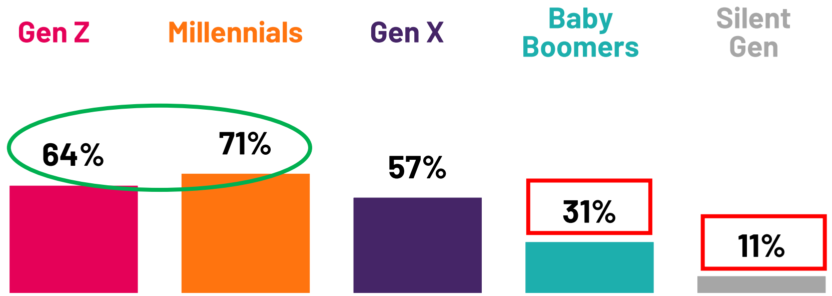


Broadband is more important to me than TV

Total Pop.



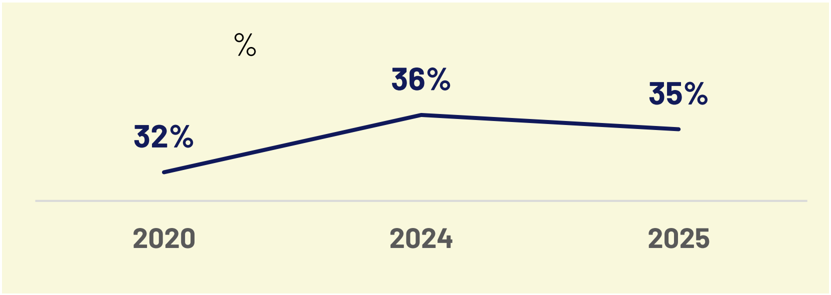
Generations

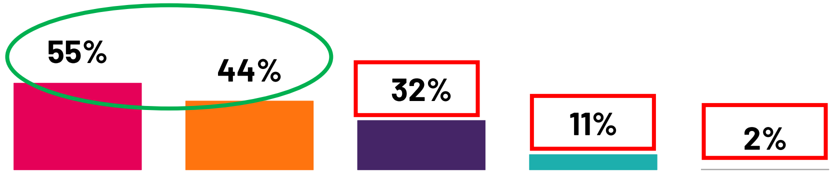


YouTube

I am watching more content on YouTube than on live TV

Total Pop.





○ = Significantly higher □ = Significantly lower

Base: All Adults 16+ - 1,005

Q.13b To what extent do you agree or disagree ...

This shift to online entertainment is seen much more among middle class and urban cohorts, but non-Dublin urbanites and rural dwellers are driving the growth in this perception

		Social class		Region		
		ABC1	C2DE	Dublin	Other urban	Rural
Broadband is more important to me than TV	**55%** Total Pop.	**61%**	**50%**	65%	47%	**56%**
I am watching more content on YouTube than on live TV	**35%** Total Pop.	51%	19%	45%	26%	35%

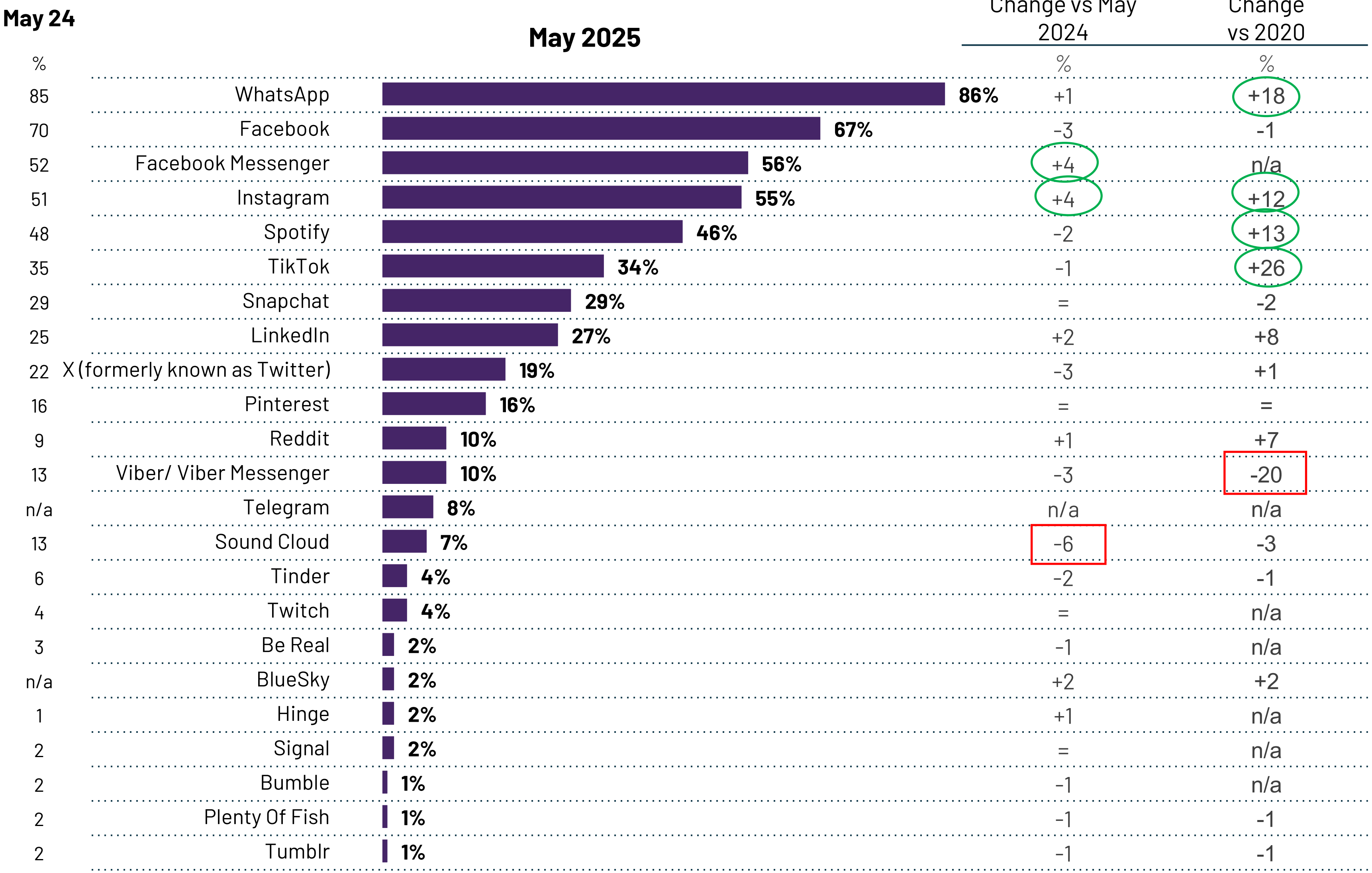
Significantly higher **Significantly lower**

Base: All Adults 16+ - 1,005

Q.13b To what extent do you agree or disagree ...

WE’RE (ONLINE) SOCIAL ANIMALS

WhatsApp continues to be the most popular way to communicate among respondents



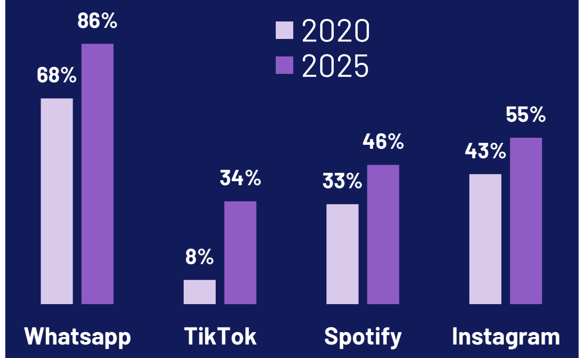
May 24 %		May 2025	Change vs May 2024 %	Change vs 2020 %
85	WhatsApp	86%	+1	○ +18
70	Facebook	67%	-3	-1
52	Facebook Messenger	56%	○ +4	n/a
51	Instagram	55%	○ +4	○ +12
48	Spotify	46%	-2	○ +13
35	TikTok	34%	-1	○ +26
29	Snapchat	29%	=	-2
25	LinkedIn	27%	+2	+8
22	X (formerly known as Twitter)	19%	-3	+1
16	Pinterest	16%	=	=
9	Reddit	10%	+1	+7
13	Viber/ Viber Messenger	10%	-3	□ -20
n/a	Telegram	8%	n/a	n/a
13	Sound Cloud	7%	□ -6	-3
6	Tinder	4%	-2	-1
4	Twitch	4%	=	n/a
3	Be Real	2%	-1	n/a
n/a	BlueSky	2%	+2	+2
1	Hinge	2%	+1	n/a
2	Signal	2%	=	n/a
2	Bumble	1%	-1	n/a
2	Plenty Of Fish	1%	-1	-1
2	Tumblr	1%	-1	-1

Base: All Adults 16+ - 1,005

Q.5 Which of the following, if any, do you ever use nowadays?

○ = Significantly higher □ = Significantly lower

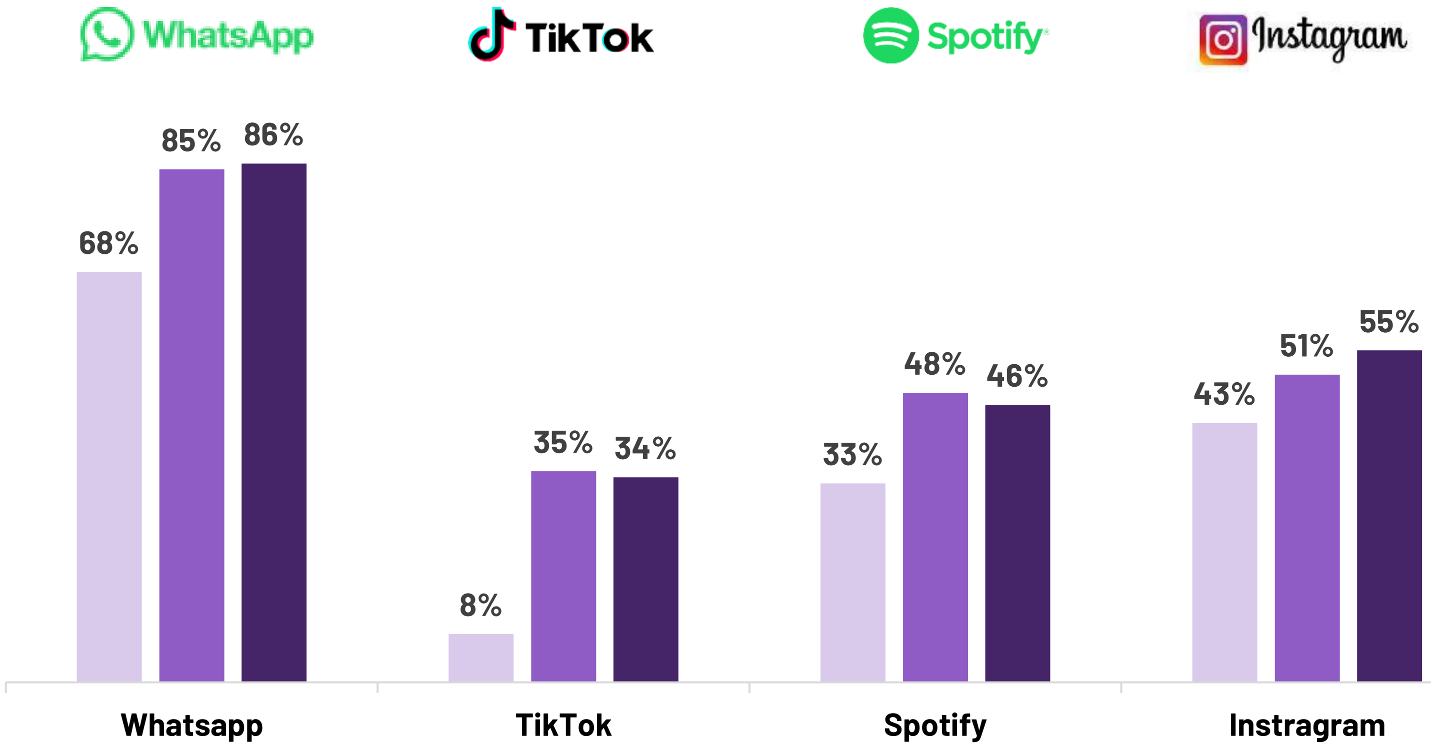
The big movers in the last five years are Tik Tok (+26), WhatsApp (+18), Spotify (+13) and Instagram (+12).



Facebook messenger added May 2021 – impacting Facebook comparison results

*Signal & Twitch also added May 2021 * = Social media*

The big movers in the last five years are Tik Tok (+26), Spotify (+13) and Instagram (+12)

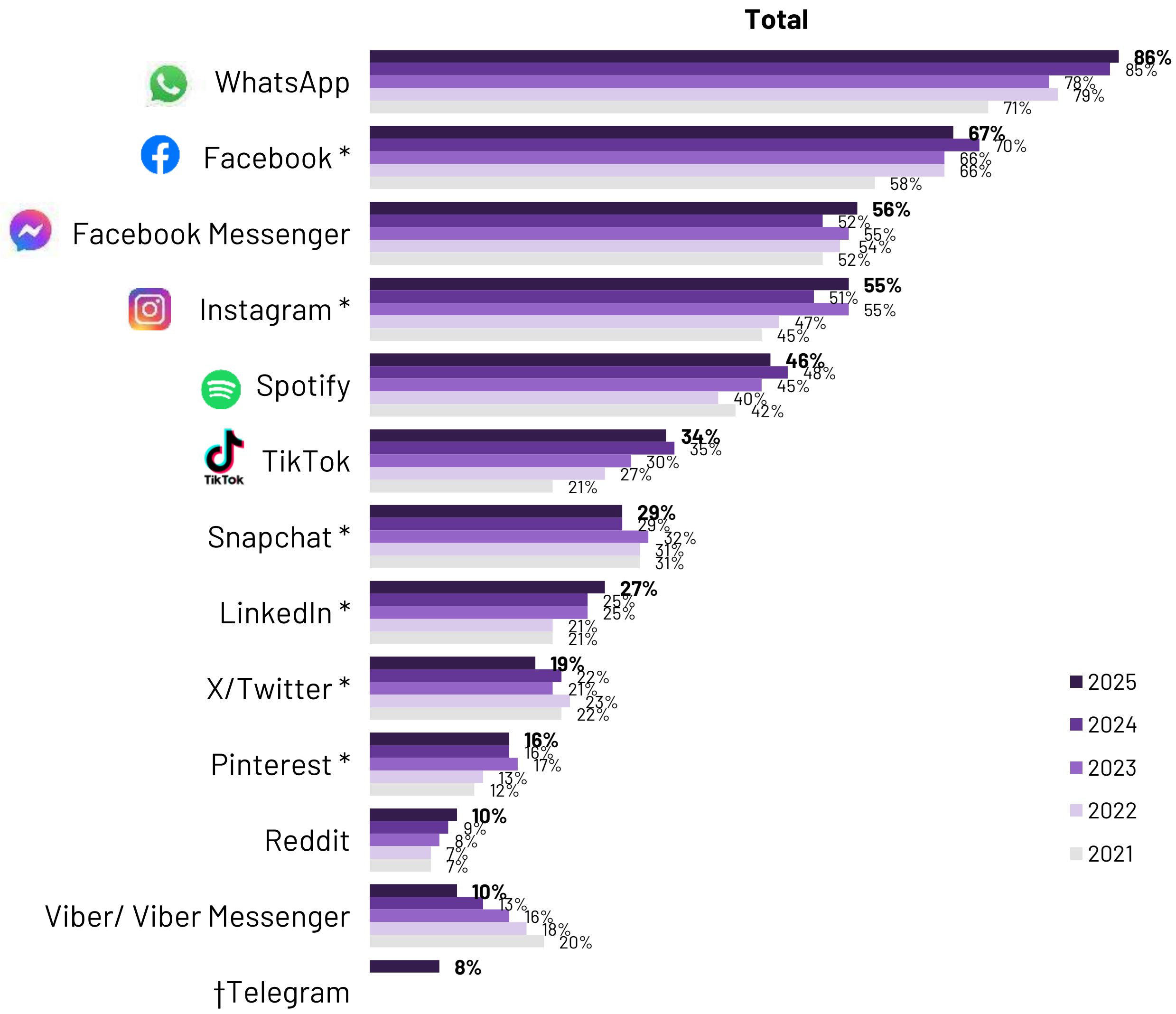


○ = Significantly higher ▭ = Significantly lower

Base: All Adults 16+ - 1,005

Q.5 Which of the following, if any, do you ever use nowadays?

Social media platforms we are using nowadays - Trended



Base: All Adults 16+ - 1005

Q.5 Which of the following, if any, do you ever use nowadays?

Facebook messenger added May 2021 – impacting Facebook comparison results

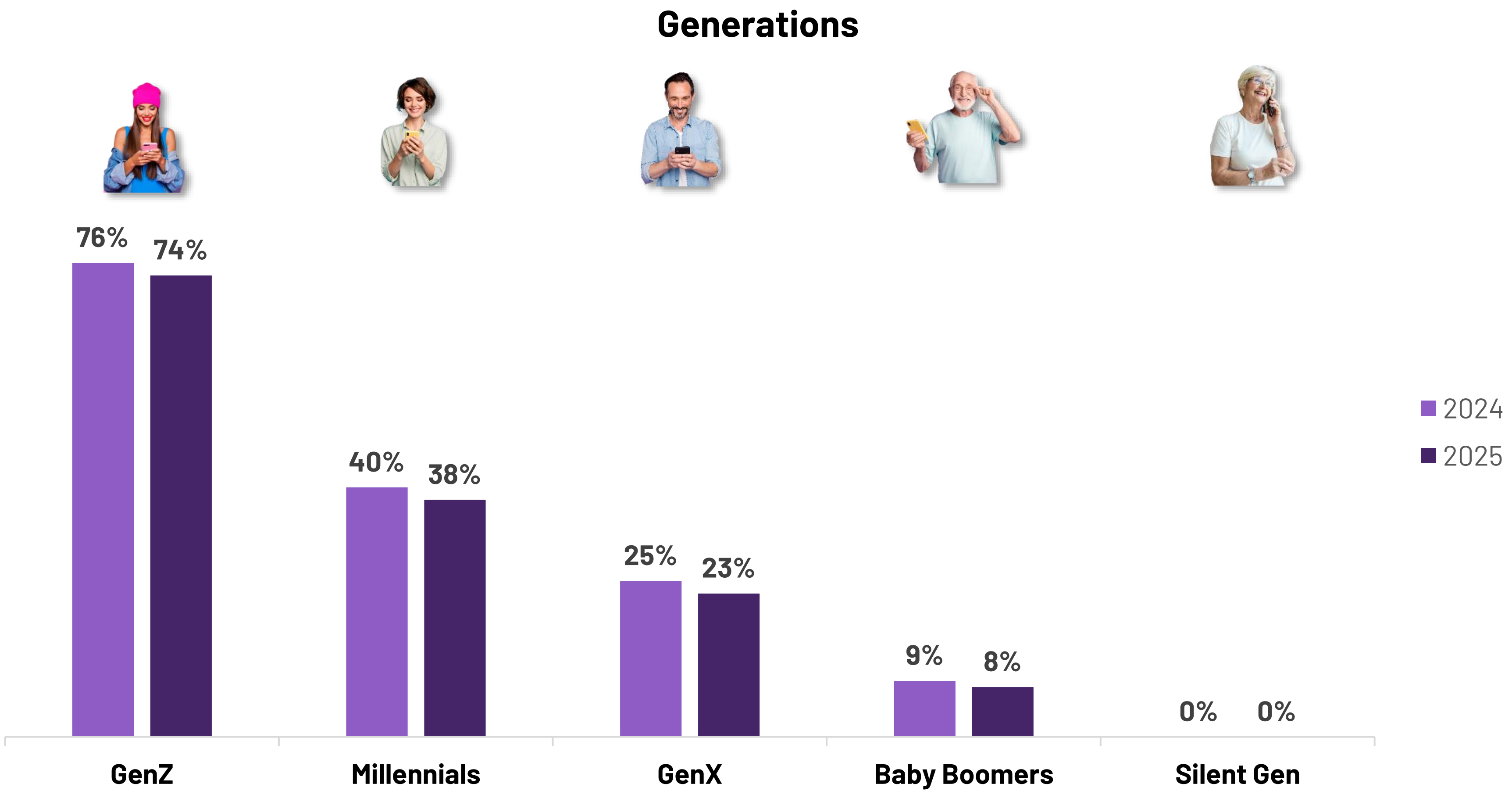
Signal & Twitch also added May 2021

** = Social media*

† = added 2025

While Millennials and Gen X have a presence on the app, TikTok is used by the majority of Gen Z

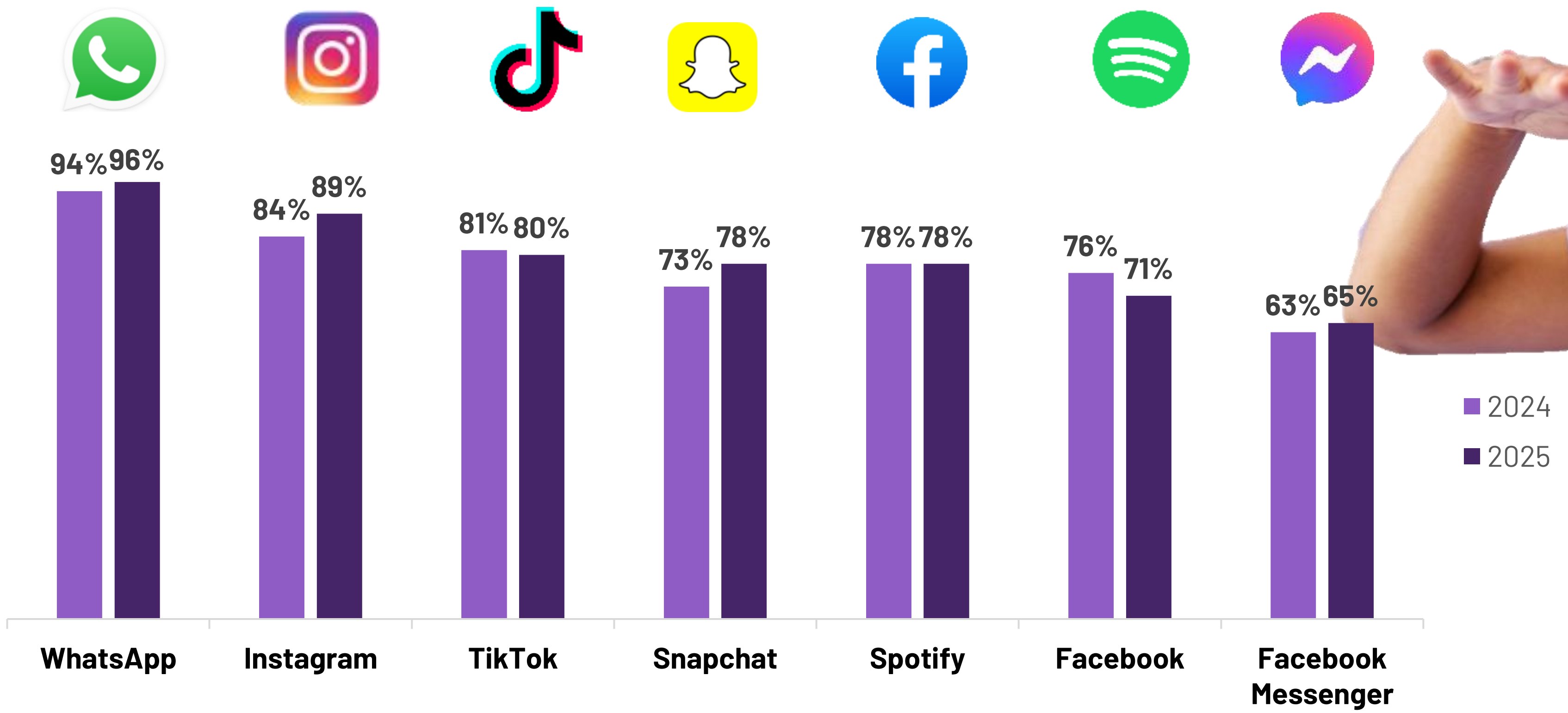
Total population 16+ = 34%



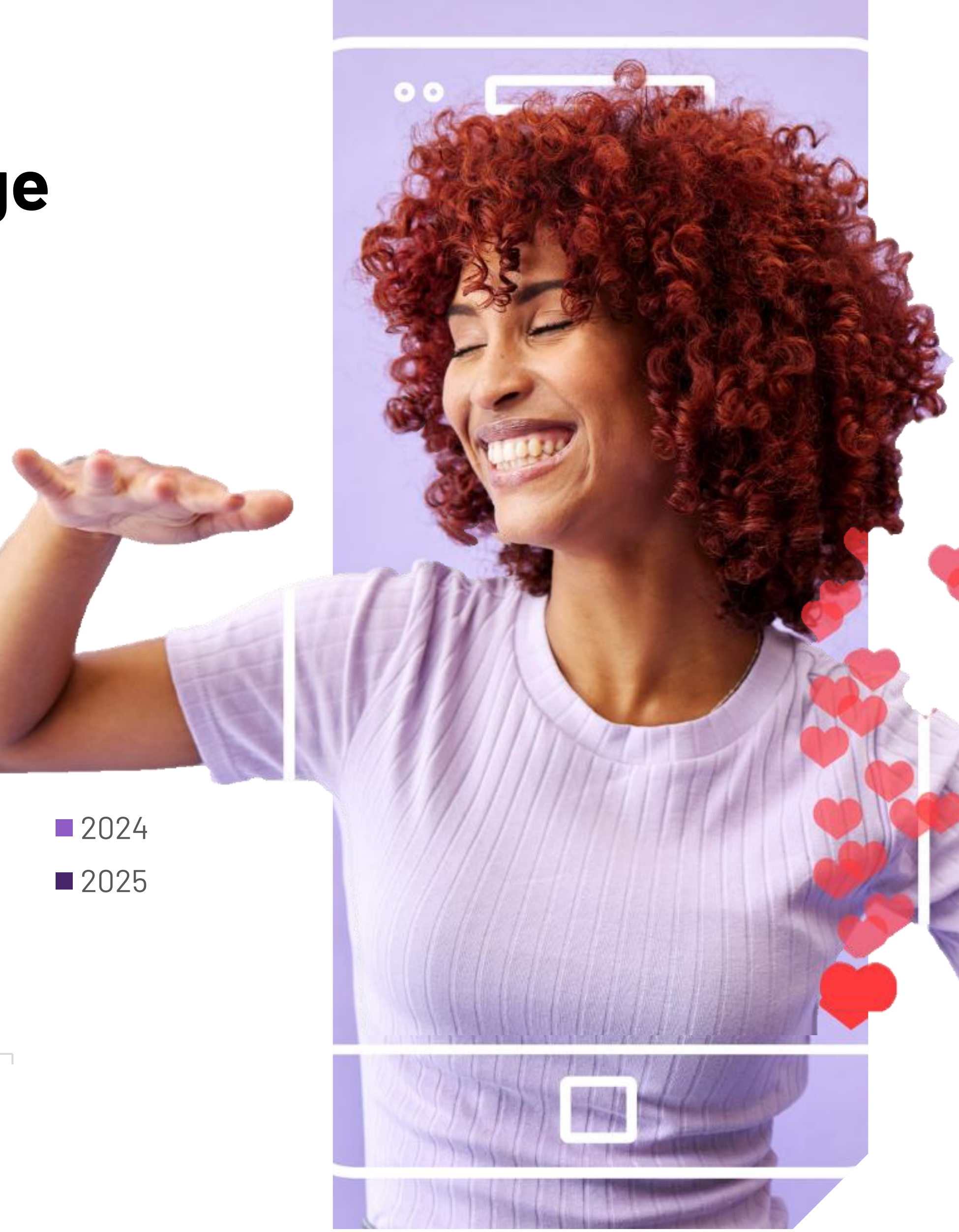
Base: all Adults 16+ - 1,005

Marked growth in the last year in usage of WhatsApp, Instagram, decline in Spotify usage

App usage among 16-24-year-olds



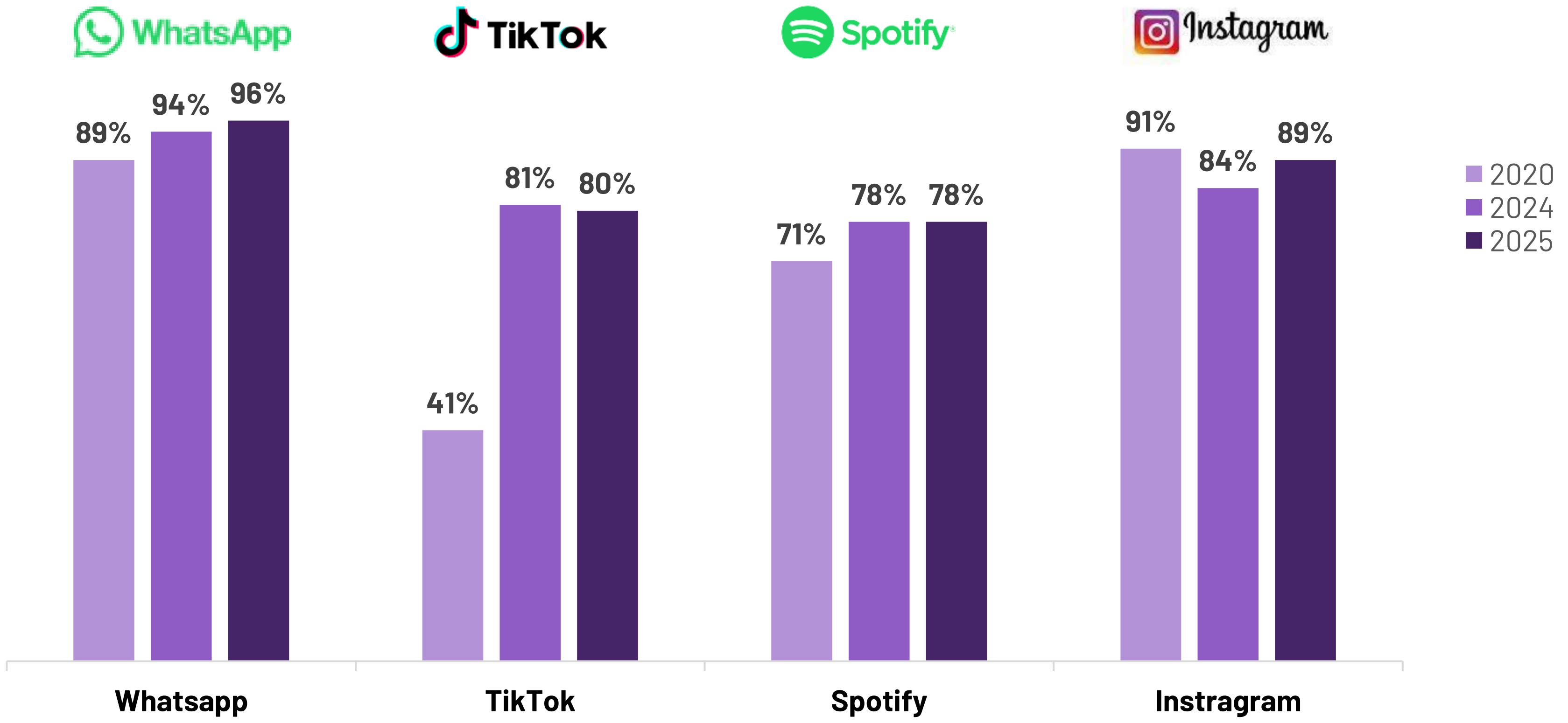
	2024	2025
WhatsApp	94%	96%
Instagram	84%	89%
TikTok	81%	80%
Snapchat	73%	78%
Spotify	78%	78%
Facebook	76%	71%
Facebook Messenger	63%	65%



Base: All 16-24 year olds - 95

Q.5 Which of the following, if any, do you ever use nowadays?

Instagram and Tik Tok most popular social media platform among 16-24-year-olds, with TikTok usership continuing to grow in this demographic. WhatsApp dominating communications in this age group

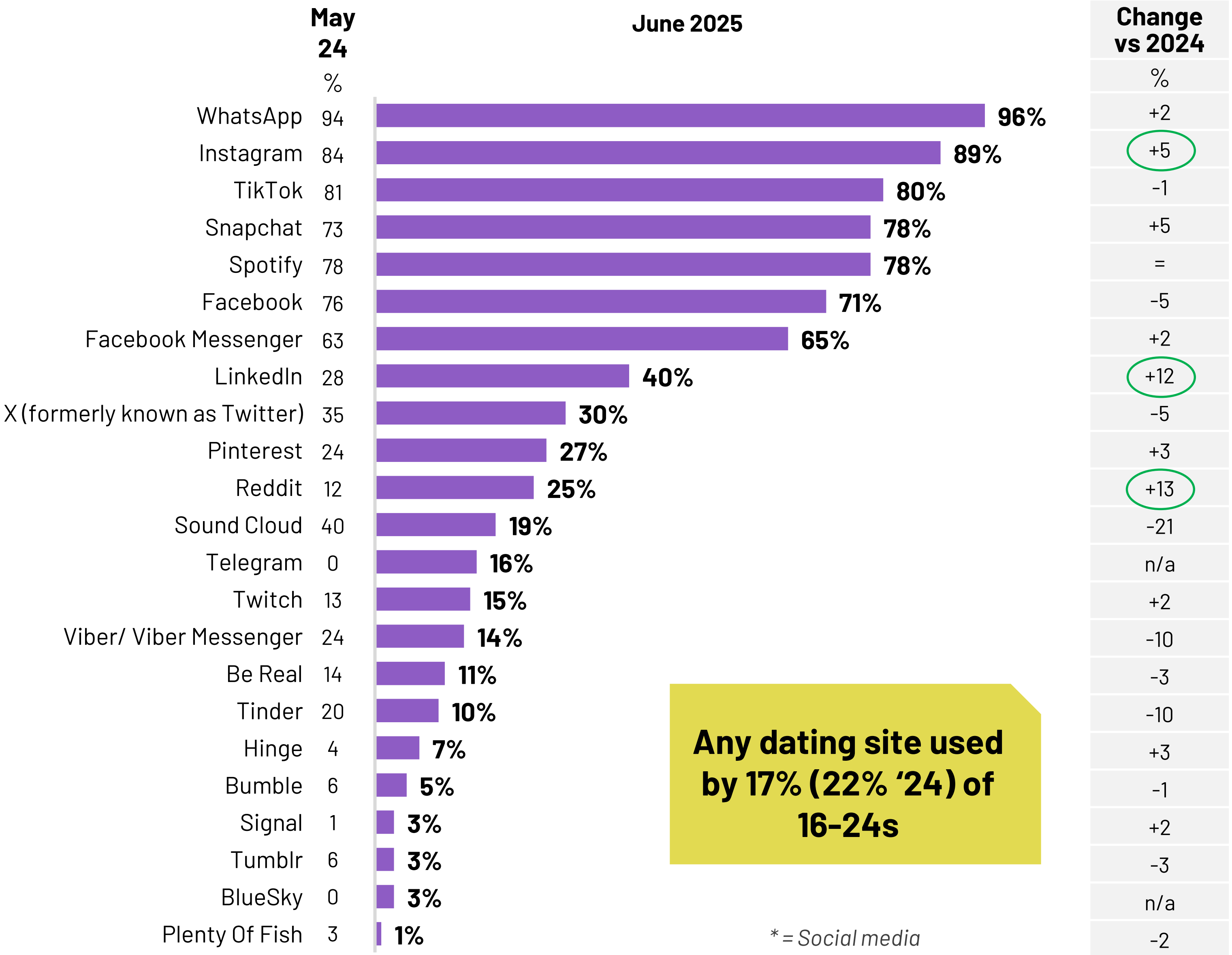


Base: All 16-24 yrs - 95

Q.5 Which of the following, if any, of these do you ever use nowadays?

Biggest growth in usership since 2024 seen in Instagram, LinkedIn and Reddit among 16–24-year-olds

Significant declines in usage of SoundCloud, Viber and Tinder.



	May 24 %	June 2025	Change vs 2024 %
WhatsApp	94	96%	+2
Instagram	84	89%	+5
TikTok	81	80%	-1
Snapchat	73	78%	+5
Spotify	78	78%	=
Facebook	76	71%	-5
Facebook Messenger	63	65%	+2
LinkedIn	28	40%	+12
X (formerly known as Twitter)	35	30%	-5
Pinterest	24	27%	+3
Reddit	12	25%	+13
Sound Cloud	40	19%	-21
Telegram	0	16%	n/a
Twitch	13	15%	+2
Viber/ Viber Messenger	24	14%	-10
Be Real	14	11%	-3
Tinder	20	10%	-10
Hinge	4	7%	+3
Bumble	6	5%	-1
Signal	1	3%	+2
Tumblr	6	3%	-3
BlueSky	0	3%	n/a
Plenty Of Fish	3	1%	-2

Any dating site used by 17% (22% ‘24) of 16-24s

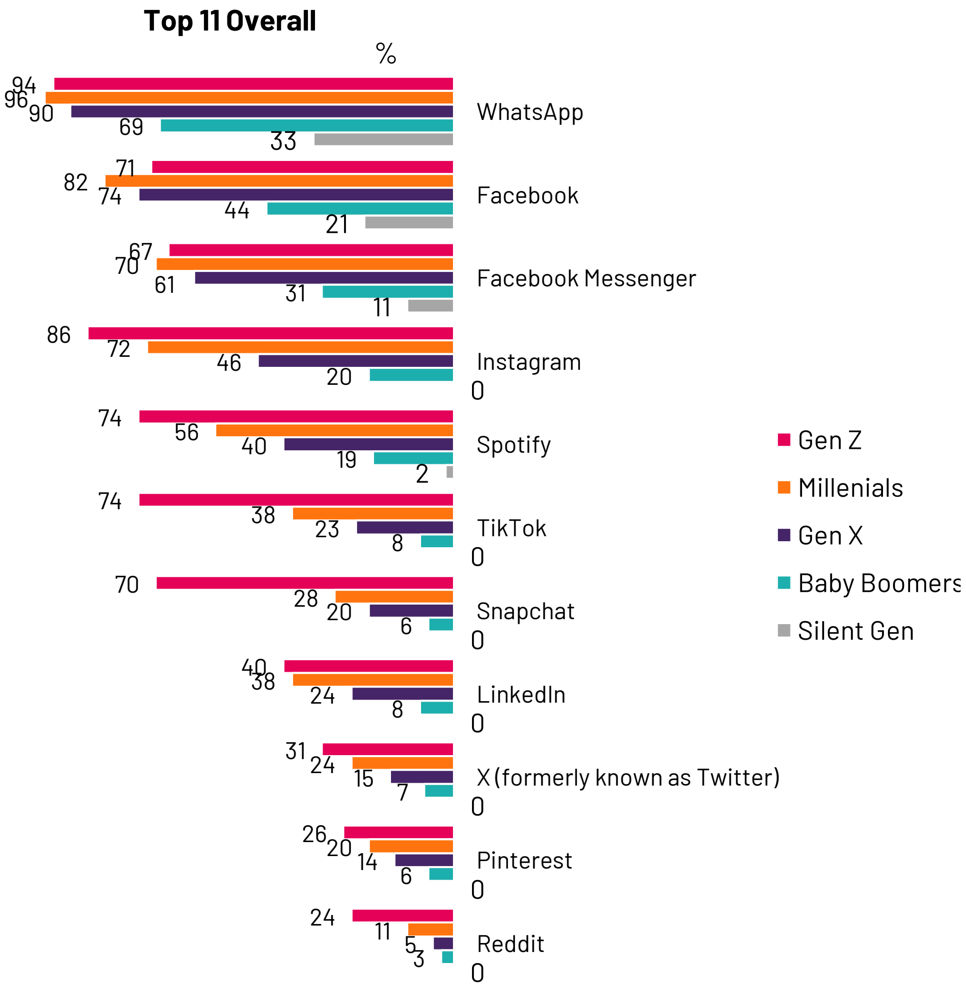
** = Social media*
+ = Dating Sites

BeReal & Hinge added May 2023
Telegraph + Bluesky added 2025

Base: All 16-24 yrs - 95

Q.5 Which of the following, if any, of these do you ever use nowadays?

Online services we are using nowadays x Generations



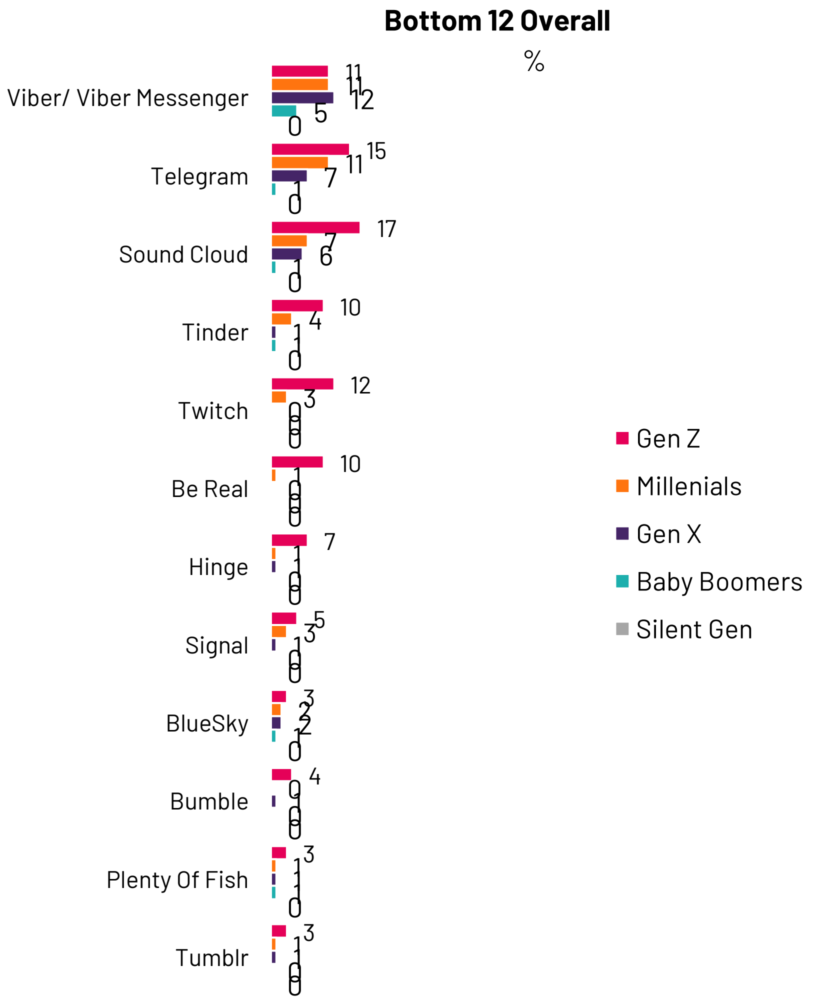
Gen Z

Millennials

Gen X

Baby Boomers

Silent Gen

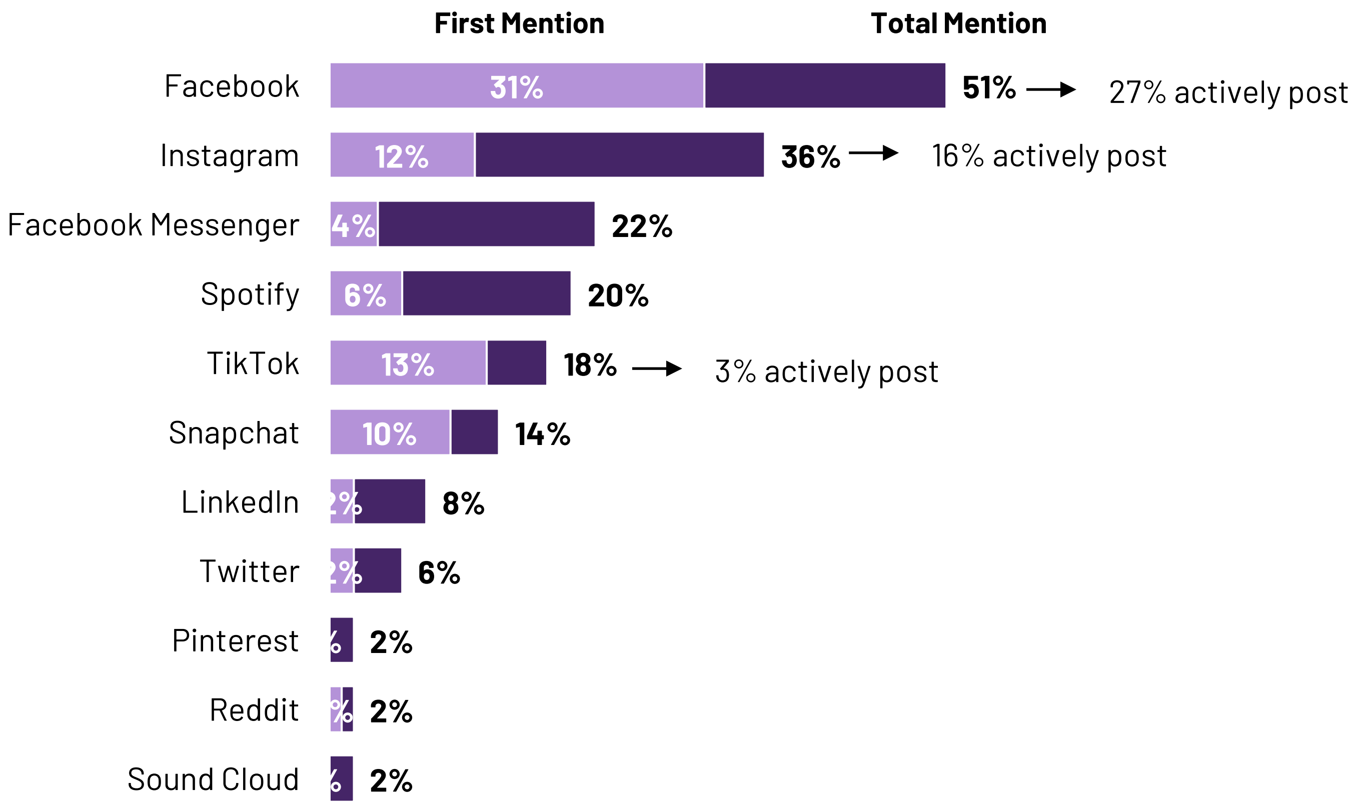


WhatsApp shows highest usage across all generations, Snapchat and TikTok dominated by Gen Z.

Base: All adults 16+ - 1,005

Q.5 Which of the following, if any, do you ever use nowadays?

Facebook shows highest usage and spontaneous awareness. Only Gen Z has a different app as their most used. Baby Boomers and Silent Gen app usage significantly lower than Gen Z, Millennials and Gen X.



Generations

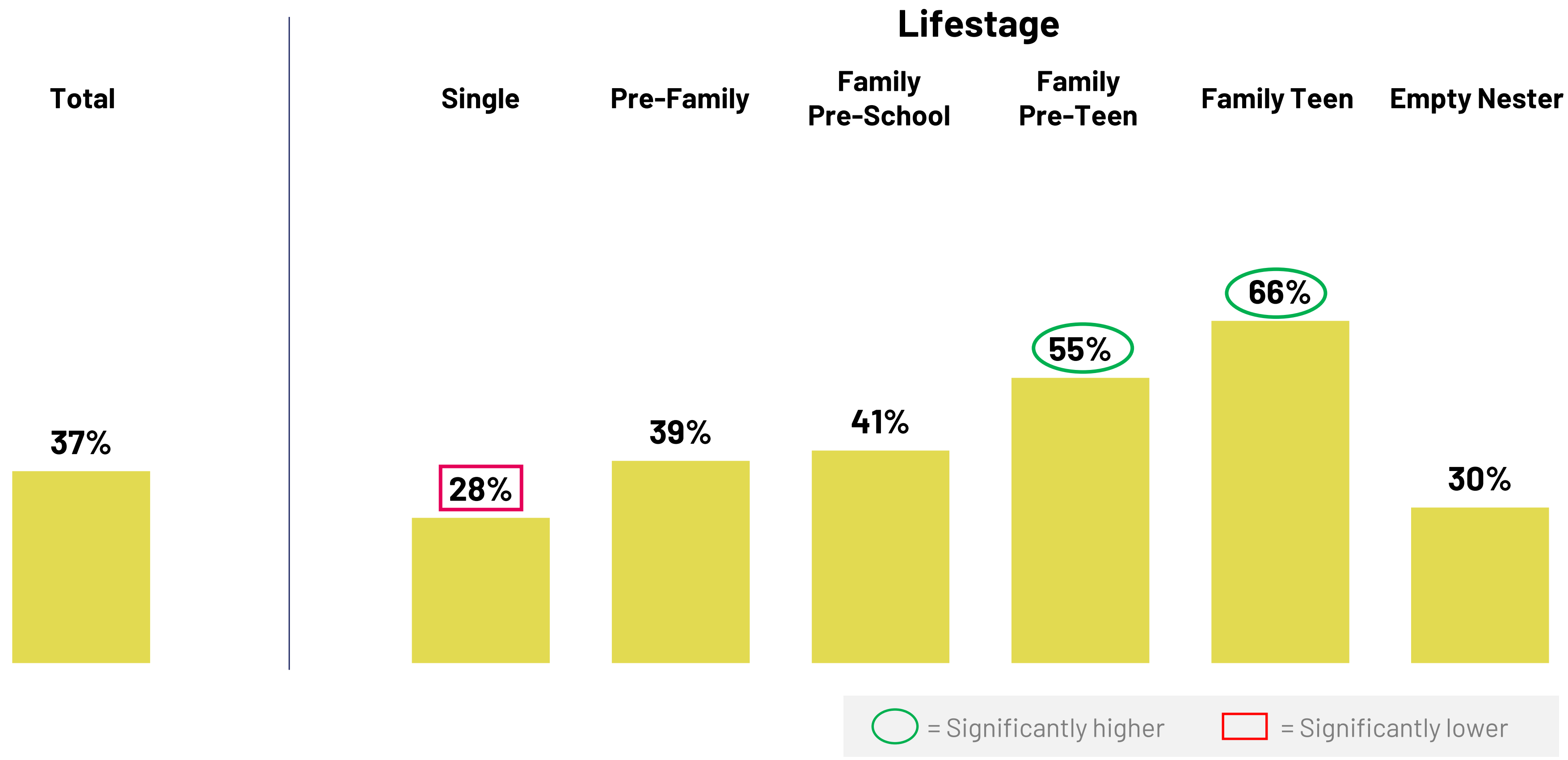
	Top Used App (excluding WhatsApp)	
Gen Z	Instagram	81%
Millennials	Facebook	69%
Gen X	Facebook	64%
Baby Boomers	Facebook	36%
Silent Gen	Facebook	19%

Base: All adults 16+ - all excluding WhatsApp - 1005
Q.5a And which one do you mostly use – all social media sites?
Q5b And which, if any, of the following Social Media sites do you actively post on?

○ = Significantly higher ☐ = Significantly lower

IMPACT OF OUR ONLINE LIVES

Single respondents unconcerned about the impact of technology on home life - those with pre-teens and teens in the home agree more in the negative impact of same.



Base: All Adults 16+ - 1,000
Q.13 To what extent do you agree or disagree ...Technology is having a negative impact on family life in my home (e.g. people spending too much time on different devices, etc.)

37%

Agree that …

Technology is having a negative impact on family life in their home (e.g. people spending too much time on different devices, etc.)

Generations

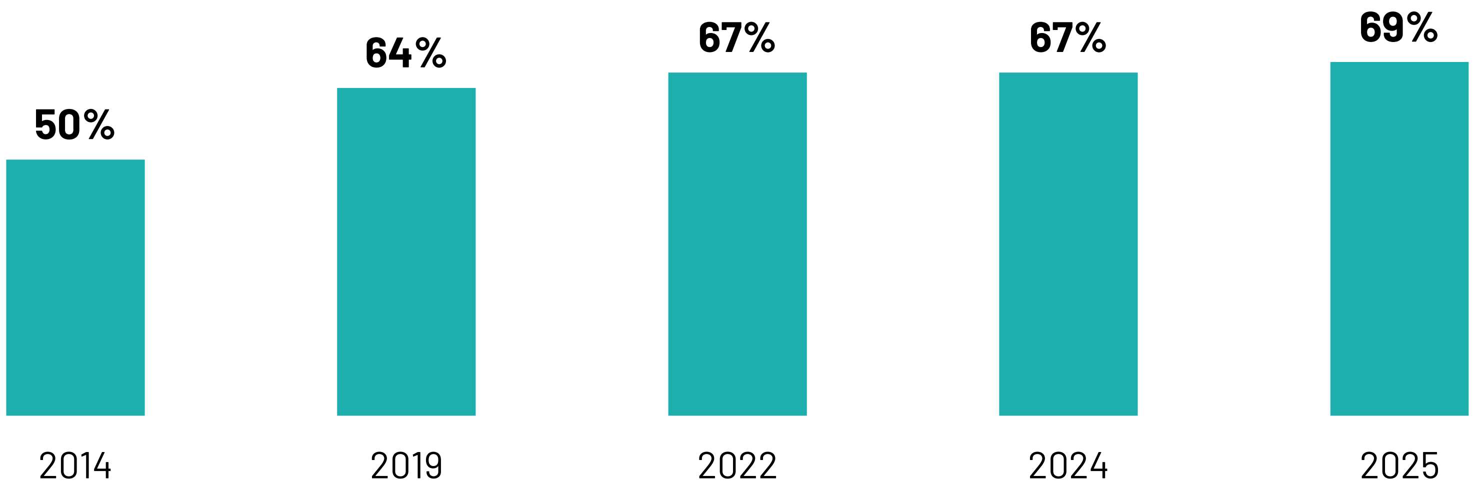
Gen Z	37%
Millennials	42%
Gen X	○ 47%
Baby Boomers	▭ 22%
Silent Gen	24%

Baby Boomers least likely to agree that tech is having a negative effect on family life, with Gen X and Millennials most likely.

○ = Significantly higher ▭ = Significantly lower

Just under 7 in 10

feel we have lost the art of conversation – Agreement continuing to grow



Age

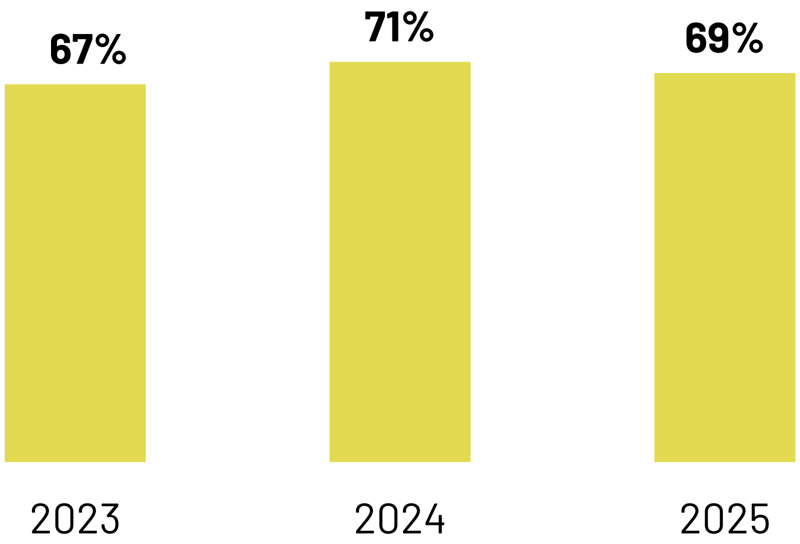
	2019 %	2022 %	2024 %	**2025** **%**
16-24	47	52	58	**49**
25-34	54	62	57	**70**
35-49	62	64	68	**66**
50-64	69	75	74	**73**
65+	60	74	74	**81**

The 50+ age group is driving the increase – though significant increase in the 25-34 age group since last year.

○ = Significantly higher □ = Significantly lower

69%

now agree there is Increased worry that children's ability to communicate in person has been stunted due to technology



Age	2025
	%
16-24	45
25-34	69
35-49	70
50-64	76
65+	77

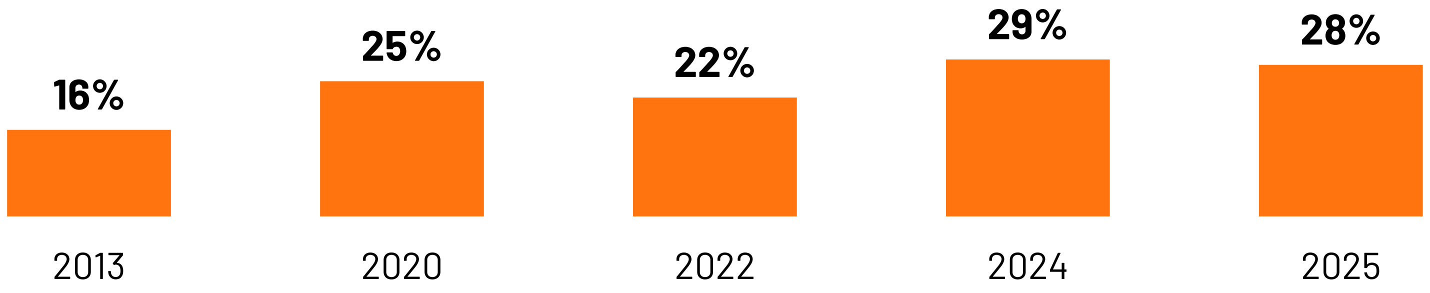
Lifestage	2025
	%
Family Pre-teen	74
Family Teen	85

Those with kids, either pre-teen or teenagers, show higher concern – likely seeing this first hand.

○ = Significantly higher □ = Significantly lower

3 in 10

find it hard to switch off from thinking about work/school/ college in their spare time in the evening/weekends



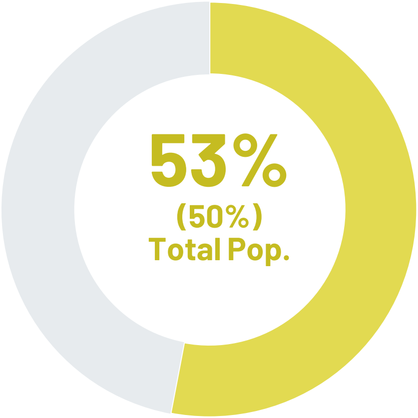
Age

	2020	2022	2024	2025
	%	%	%	%
16-24	39	39	32	44
25-34	34	33	48	41
35-49	26	21	34	34
50-64	18	14	25	17
65+	9	10	8	11

Nearly half of those aged 16-24 are finding it hard to switch off, increasing significantly from 2024.

Increase in checking of emails, texts or social media first thing after waking or right before sleeping. Over half now claiming to do so for each.

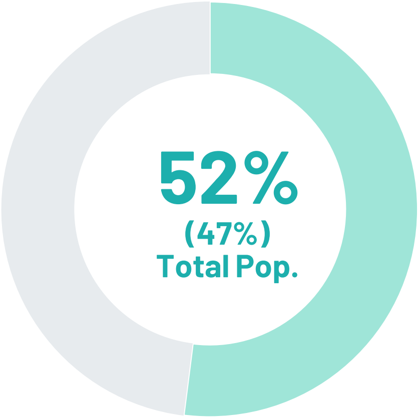
The first thing I do in the morning is check emails, text messages, or social media sites



Work from Home

ANY Yes	No	ANY Regular WFH
59%	53%	**60%**

The last thing I do at night is check emails, text messages or social media sites



Work from Home

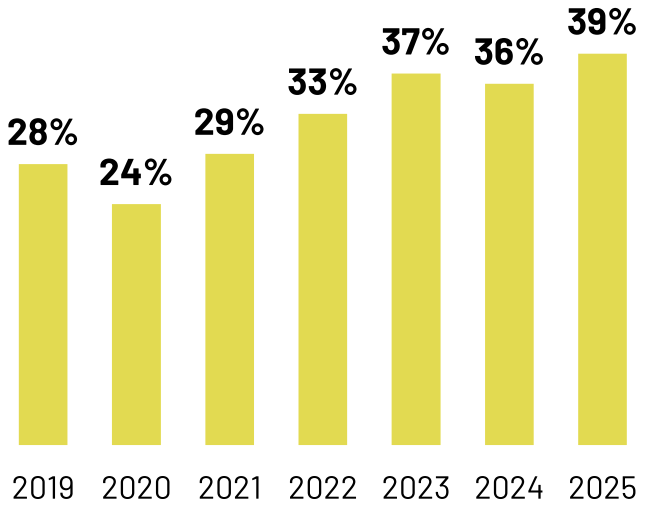
ANY Yes	No	ANY Regular WFH
57%	48%	**58%**

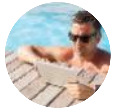
Significantly higher **Significantly lower**

Base: All Adults 16+ who use SM - 895

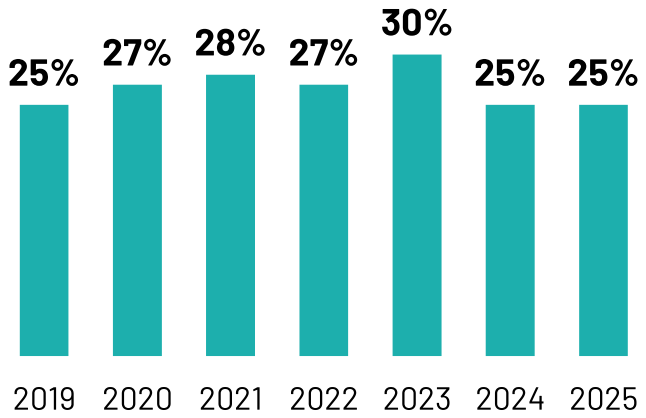
Rates of checking social media or emails when struggling to sleep continue to grow, with as many as 2 in 5 now claiming to do so. Gen Z most prone to this behaviour, with just below 7 in 10 claiming to do so.

Check social media or emails when having difficulty sleeping





Check work emails when on holidays



(38% amongst ABC1)

Generations

	 Check social media or emails when having difficulty sleeping	 Check work emails when on holidays
Gen Z	68%	33%
Millennials	48%	32%
Gen X	35%	28%
Baby Boomers	10%	8%
Silent Gen	2%	5%

More likely to be ABC1 (due to having more tech and their type of work)

Base: All Adults 16+ - 1,005

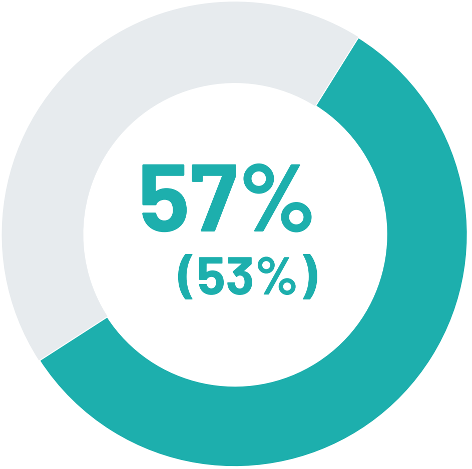
Q.8 Which, if any of the following do you do nowadays? ...Check work emails when on holidays

○ = Significantly higher ☐ = Significantly lower

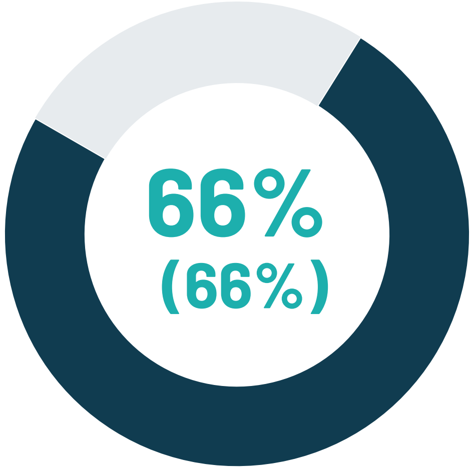
INCREASED CONCERN SURROUNDING DATA PRIVACY

Concern levels steady about how their data is used by organisations, overall concern highest among Gen X

Worry About Data Privacy Online



I am concerned in general nowadays regarding how my data is used by organisations



() = 2024 data

Generations

	Worry About Data Privacy Online	I am concerned in general nowadays regarding how my data is used by organisations
Gen Z	53%	63%
Millennials	64% ○	74%
Gen X	67% ○	76% ○
Baby Boomers	46% □	61%
Silent Gen	25% □	37% □

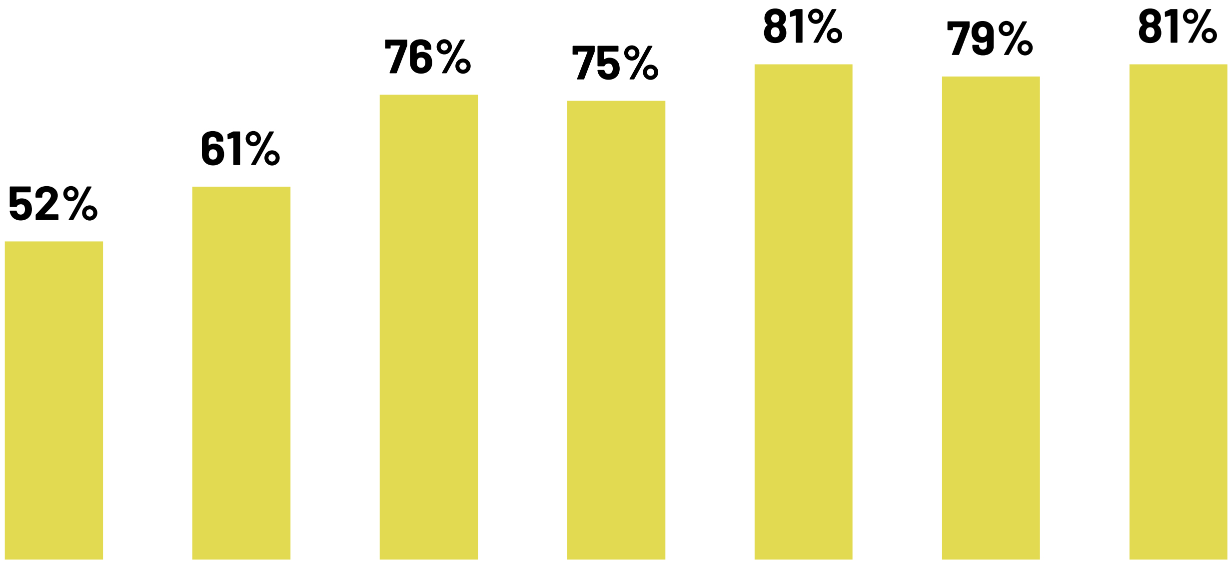
○ = Significantly higher □ = Significantly lower

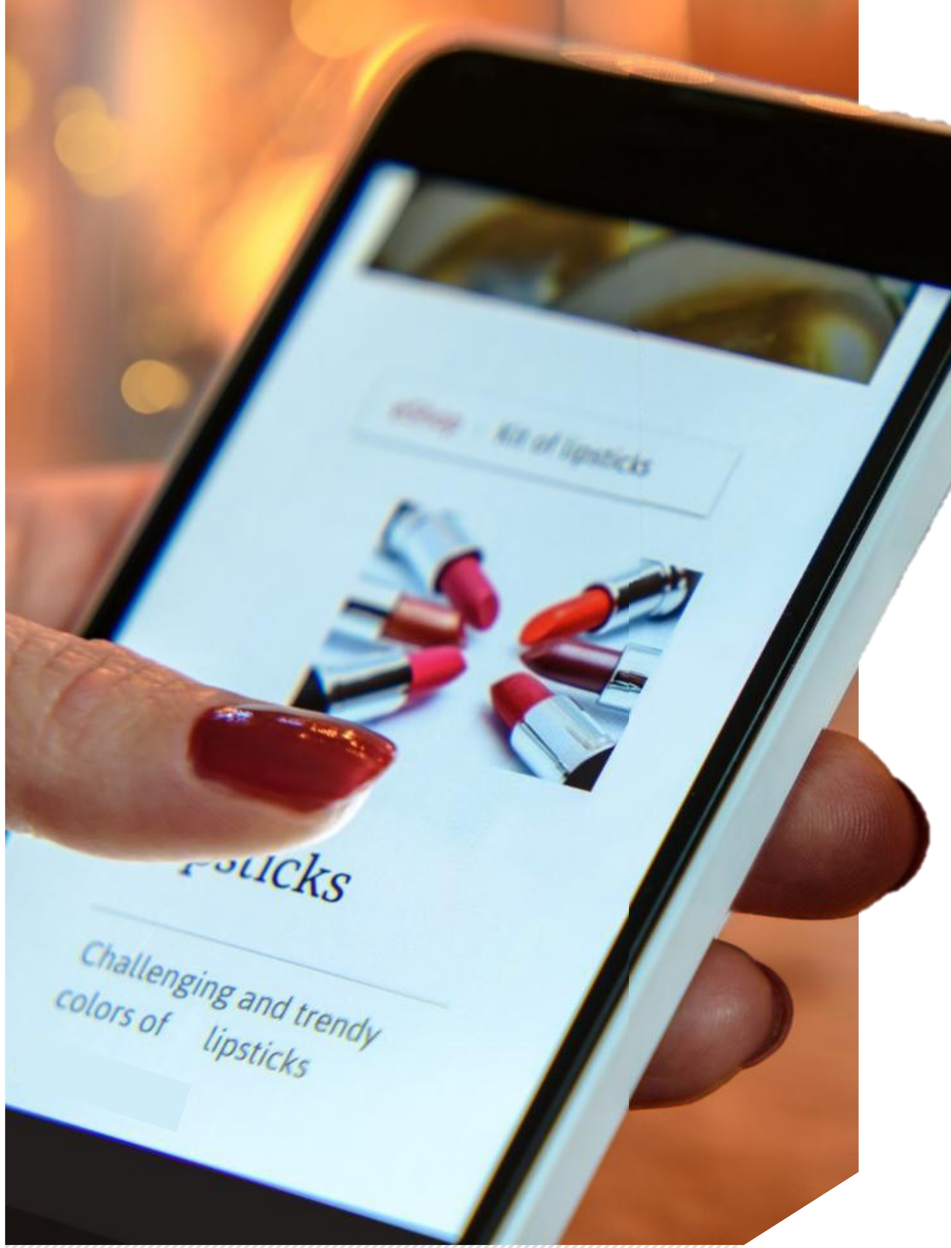
ONLINE PURCHASING & ACTIVITIES

4 in 5 (81%)

of the population purchase online*

The under 50's continue to be the main online purchasers





* The defined category of; clothes/shoes, groceries, pharmaceutical drugs/medicines, flights, hotel bookings, car hire bookings, music/film downloads/CD/DVDs/TV shows, computer games, books/magazines, electric goods (including mobile phones), none of these

Base: All respondents 1005

4 in 5 purchase online. Growth seen in grocery sales, some decline in travel related purchases – Flights (-8) and Hotels (-8)

Flights	**80%**	(88%)	[83%]
Hotels	**76%**	(84%)	[80%]
Clothes/shoes	**81%**	(84%)	[76%]
Electric Goods	**50%**	(50%)	[48%]
Car hire	**37%**	(38%)	[38%]
Music/film downloads/CD/ DVDs/TV shows	**37%**	(37%)	[36%]
Magazine/ Book	**32%**	(37%)	[32%]
Groceries	**29%**	(26%)	[10%]
Computer games	**26%**	(28%)	[27%]
Pharm drugs/ medicines	**15%**	(12%)	[10%]
***Pet related products/food**	***14%**		
***Art related products**	***8%**		

Online purchases Generations

Gen Z	○ 92%	*(90%)*
Millennials	○ 97%	*(93%)*
Gen X	○ 87%	*(89%)*
Baby Boomers	☐ 54%	*(56%)*
Silent Gen	☐ 19%	*(15%)*

Base: All purchasing good/services online @Q8 - 401

** = new statements 2025*
( ) = 2024
[ ] = 2019

○ = Significantly higher ☐ = Significantly lower

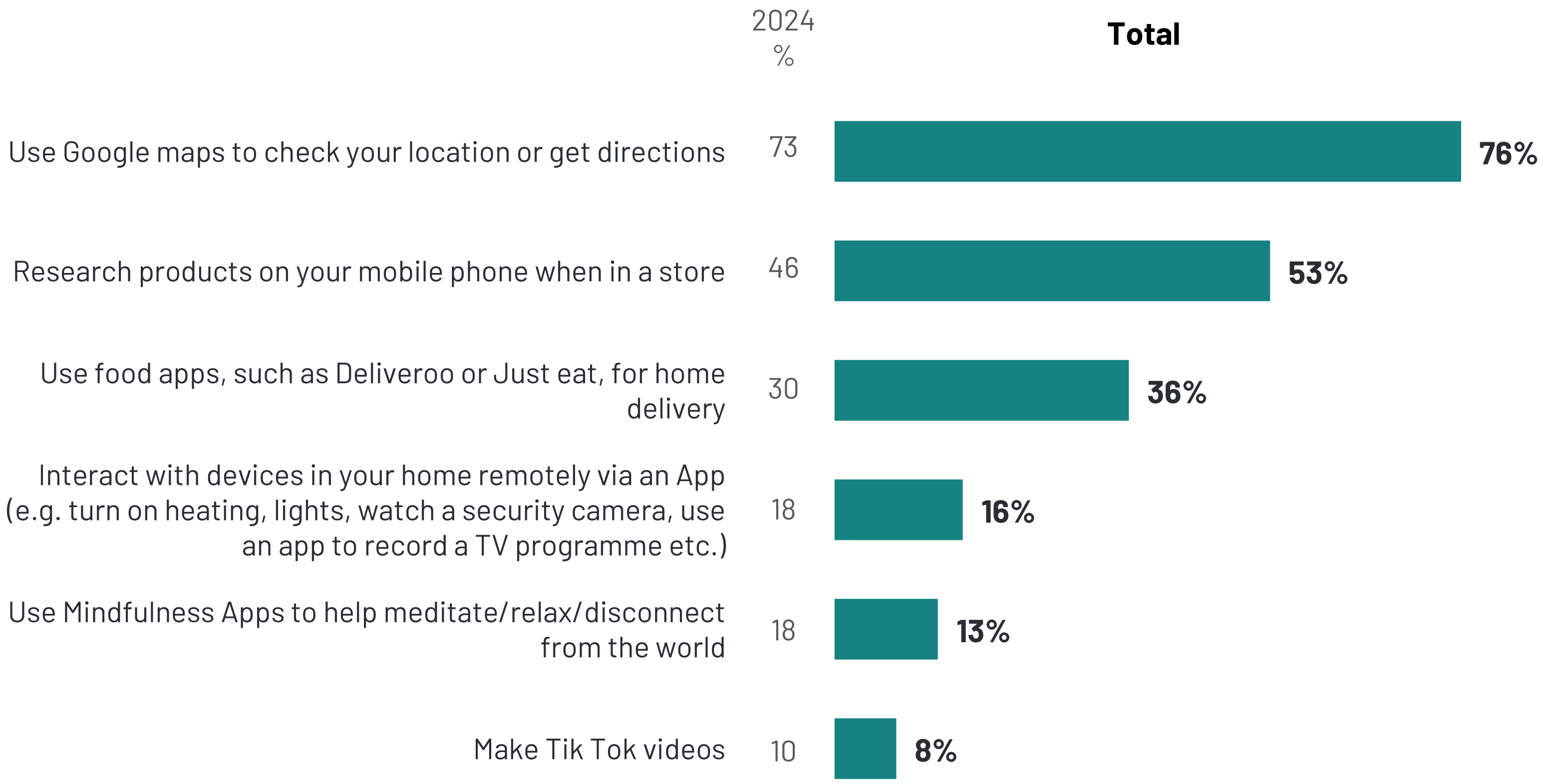
19%

of all adults have purchased groceries online (15% in 2023)

(Higher amongst middle-class Dubliners)

Usage of food apps, product research in store, and Google Maps all increasing since 2024, with Gen Z and Millennials significantly higher users of each

Gen Z and Millennials driving usage of these online services



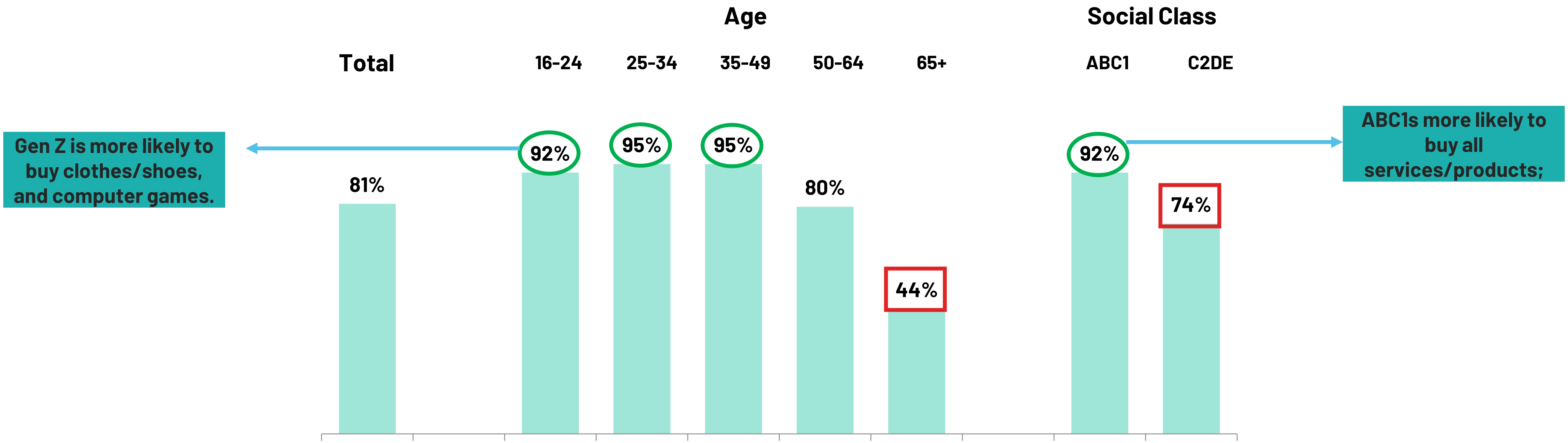
	Generation				
	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
	163	*252*	*220*	*312*	*53*
Use Google maps to check your location or get directions	90	87	80	52	-
Research products on your mobile phone when in a store	72	67	54	23	2
Use food apps, such as Deliveroo or Just eat, for home delivery	61	48	30	8	-
Interact with devices in your home remotely via an App (e.g. turn on heating, lights, watch a security camera, use an app to record a TV programme etc.)	18	22	18	8	-
Use Mindfulness Apps to help meditate/relax/disconnect from the world	17	15	14	6	-
Make Tik Tok videos	22	8	4	1	2

Base: All adults 16+ - 1,005
Q.8 Which, if any of the following do you do nowadays?

Significantly higher **Significantly lower**

The under 50s and middle class continue to be the main online purchasers

Clear socio-economic divide evident



Gen Z is more likely to buy clothes/shoes, and computer games.

ABC1s more likely to buy all services/products;

◯ = Significantly higher 🟥 = Significantly lower

Base: All Adults 16+ - 1,005
Q.10 Do you buy products or services online nowadays from any of the following categories?

What we are buying online x Generation

	Total	Generation				
		Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
UNWTD	*1005*	*154*	*316*	*228*	*278*	*29*
	%	%	%	%	%	%
Flights	**70**	**70**	**88**	**76**	**47**	**16**
Hotel Bookings	**66**	**65**	**79**	**78**	**44**	**14**
Clothes / shoes	**61**	**79**	**80**	**64**	**26**	**-**
Electrical goods (including mobile phones)	**36**	**45**	**51**	**37**	**11**	**-**
Car Hire Bookings	**31**	**19**	**43**	**41**	**18**	**2**
Music/film downloads/CD/DVDs/TV shows	**25**	**40**	**31**	**23**	**7**	**-**
Books/Magazines	**23**	**28**	**28**	**23**	**14**	**-**
Groceries	**19**	**13**	**33**	**21**	**5**	**2**
Computer Games	**18**	**37**	**22**	**15**	**2**	**-**
Pharmaceutical drugs/medicines	**10**	**5**	**16**	**11**	**8**	**-**
Pet related products/food	**10**	**14**	**11**	**8**	**6**	**-**
Art related products	**8**	**10**	**14**	**6**	**2**	**-**

Millennials driving online purchasing, with Gen Z and Gen X also contributing.

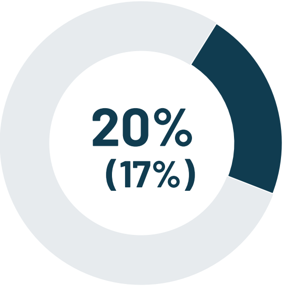
Base: All Adults 1,005
Q.10 Do you buy products or services online nowadays from any of the following categories?

Significantly higher **Significantly lower**

Marginal increases in buying products based on influencer/ celebrity endorsement and following brands on social media – Gen Z most prominent drivers.

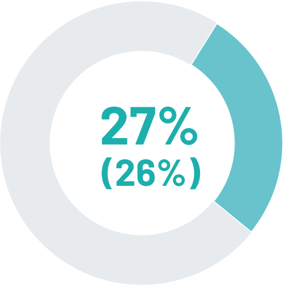
No notable shift in following celebrities, youtubers or “influencers”.

Buy products or services based on recommendations from ‘Influencers’/ Celebrity endorsements



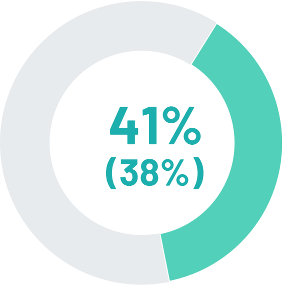
Gen Z	39%
Millennials	23%
Gen X	18%
Baby Boomers	4%
Silent Gen	0%

I follow a lot of celebrities, youtubers or “influencers”



Gen Z	58%
Millennials	29%
Gen X	21%
Baby Boomers	9%
Silent Gen	11%

I follow brands on social media (i.e. on Facebook, Instagram, etc.)



Gen Z	72%
Millennials	51%
Gen X	35%
Baby Boomers	13%
Silent Gen	0%

○ = Significantly higher ▭ = Significantly lower

( ) = 2024 data

IN SUMMARY 2025

Key themes

1. Stagnation in device ownership

- No notable shifts in device ownership.
- Smart TVs and Laptops up slightly since 2024, but not returning to 2023 levels
- "Connected home" devices seeing decreases ownership.

2. Older cohorts catching up on Internet usage

- Silent Gen in particular showing signs of increased activity online
- 19% now shopping online
- 11% now following celebrities or influencers online, up significantly since 2024 (2%)

3. Working from Home trending upward

- 26% of respondents work from home 2+ days per week, up 8% since 2024.
- 46% of workers work from home 2 or more days per week, with 53% working from home in any capacity.

4. Tech concerns high among Millennials and Gen X

- Gen X respondents showing higher concern around data privacy online (67%) and how organisations may use the data (76%).
- Millennials showing similar, with 64% concerned generally and 74% about organisation use

5. Plateau in digital finance

- Stagnation in adoption of digital finance.
- 49% use digital banking apps, no change since 2024
- 49% use contactless payments, no change since 2024
- No growth in adoption of cryptocurrency

6. Growth in popularity for on demand, free entertainment

- YouTube used by 76% of respondents
- Listening to podcasts increased to 45% of people, from 40% in 2024
- Decline in live events and sports since 2024, from 37% to 30%

7. Concern surrounding AI persisting in Ireland

- Half do not trust AI to protect personal data.
- 43% trust AI not to discriminate, compared to 46% trusting people
- 77% believe AI must be regulated; 66% fear ChatGPT's impact on students

8. Below average understanding of AI in Ireland

- 64% feel they have a good understanding of AI, 28% do not.
- Globally Ireland ranks 22nd in this regard, 3 points behind the global average
- 64% of Irish people feel nervous when a product or service uses AI

9. Some progress in adoption of AI

- Chat GPT has seen an increase in adoption, from 16% in 2024 to 22% now.
- This change primarily driven by Gen Z, with 37% using (+11%), and Millennials, with 30% now using (+8%)

IN SUMMARY

Finance:

After a period of rapid growth, digital finance has had its first year in which apps not grown their user bases, with 49% of the population using digital finance apps.

Similarly, contactless mobile payment in store via digital wallets has remained steady since 2024 (49%), up to which point steady growth was observed.

Cryptocurrency adoption has also seen no growth since 2024.

- No distinct shifts in subcategories of the population, all remain steady.

Growth in free channels of entertainment:

- 3 in 4 (76%) of us watch YouTube regularly.
- 45% listen to podcasts
- Watching live events down to 30% of the population (from 37%)

Free channels of entertainment have grown, while live events (often Pay Per View or subscription based) have seen a notable decline. Inexpensive entertainment seems to be on the upswing.

People continue to perceive Broadband as being more important than TV - 55% now agree, compared to 46% in 2020 - as more and more entertainment is delivered through digital channels.

IN SUMMARY

Tech Concerns growing among younger cohorts:

The ubiquity of technology in everyday life appears to be fostering concerns over the impact on younger people and data privacy, particularly among groups using the most.

Just under 7 in 10 agree that we have lost the art of conversation, with 25-34 year olds showing the biggest increase since 2024, jumping from 57% to 70% agreement

37% agree that technology is having a negative impact on family life in their home, with Millennials and Gen X notably higher than other generations, at 42% and 47% respectively.

We also see growing concern about privacy and usage of personal data, with 57% of respondents claiming to have this worry. This is primarily driven by the Millennials and Gen X, with over 3 in 5 of each generation worried about data privacy. 2 in 3 are concerned about how organisations are using data, again higher among Millennials and Gen X, at 3 in 4 each.

Rise in tech fluency:

4 in 5 of the population now purchase online with the top categories; clothes/shoes (81%), flights (80%), hotel bookings (76%).

We are seeing a growth in purchasing behaviour in Millennials and Silent Gen, with 1 in 5 of the Silent Gen now buying online, typically flights, hotel bookings, car hire and groceries.

Additionally, while overall following celebrities and influencers online hasn't changed, Silent Gen have seen a large increase in this since 2024, with 1 in 10 now claiming to do so (up from 2% in 2024).

In Summary: Delving into AI

Ireland's concerns around AI remain significant

Nearly 2 in 3 state that AI makes them nervous, while only 2 in 5 are excited by it. In addition, only 2 in 5 trust that their personal data will be protected.

Although, we are no longer top of the list of nervy (mostly Anglosphere) countries, we remain in the top 5 which cannot be overlooked.

Ireland is no longer the only country that trusts people more than AI to not discriminate

Italy and Singapore have joined Ireland in our leaning toward people to not discriminate as much as AI, albeit we remain the most steadfast in this belief. In Ireland, 43% trust AI, while 46% trust people not to discriminate.

Despite our distrust in AI, our usage of ChatGPT is increasing

Between 2024 and 2025, there has been a 38% increase in ChatGPT usage, moving from 16% in 2024 to 22% in 2025.

Ireland's understanding of AI falls below the average

64% feel they have a good understanding of what AI is, which falls below the average (67%), with only 2 in 5 feeling they know which products / services use AI (again falling below the average). This below average perceived understanding is likely impacting on levels of trust seen in Ireland.

AI is expected to make disinformation worse

45% feel AI will make disinformation on the internet worse, which is in line with 2024. This concern is not diminishing over time.

Although Ireland is nervy about AI, we can find some positives

Only 1 in 4 believe AI will replace their job in Ireland (36% ave.), while 1 in 3 believe it will make their job better compared to 18% noting it will make it worse. More efficiency, as well as better entertainment and health options are all noted possibilities as AI continues to develop.

THANK YOU

in
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