IPSOS B&A

TECHSCAPE 2026

Technology usage in Ireland

Introduction

A note on the generational definitions used in TechScape

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





GenZ	Millennials	Gen X	Baby Boomers	Silent Gen
Born 1996 – 2012	Born 1980-1995	Born 1966-1979	Born 1945-1965	Born 1944+
Age 16 – 28	Age 29 - 45	Age 46-59	Age 60-80	Age ≥80
21%	**29%**	**22%**	**24%**	**3%**
938,000	*1,267,000*	*975,000*	*1045,000*	*145,000*

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

KEY TALKING POINTS

Ireland has hit digital saturation. The next decade is about trust

Hardware adoption has plateaued and internet usage is now near-universal. The competitive frontier has shifted from getting technology into people's hands to earning their trust, winning their attention, and bringing everyone along.

There are six key points of discussion stemming from TechScape 2026:

1.

Peak Devices, Rising Dependence

Growth now comes from services, not screens

2.

E-Commerce is Thriving

While e-commerce is soaring, there are cohorts left behind

3.

The Persistent Tech Divide

Digital economy is divided on class, age, & geographic lines

4.

The Trust Deficit

Privacy fears & targeted ad backlash are reshaping the tech & brand contract

5.

The AI Paradox

Adoption & anxiety are rising in tandem

6.

The Attention & Wellbeing Reckoning

Always-on culture, division, and gendered harm

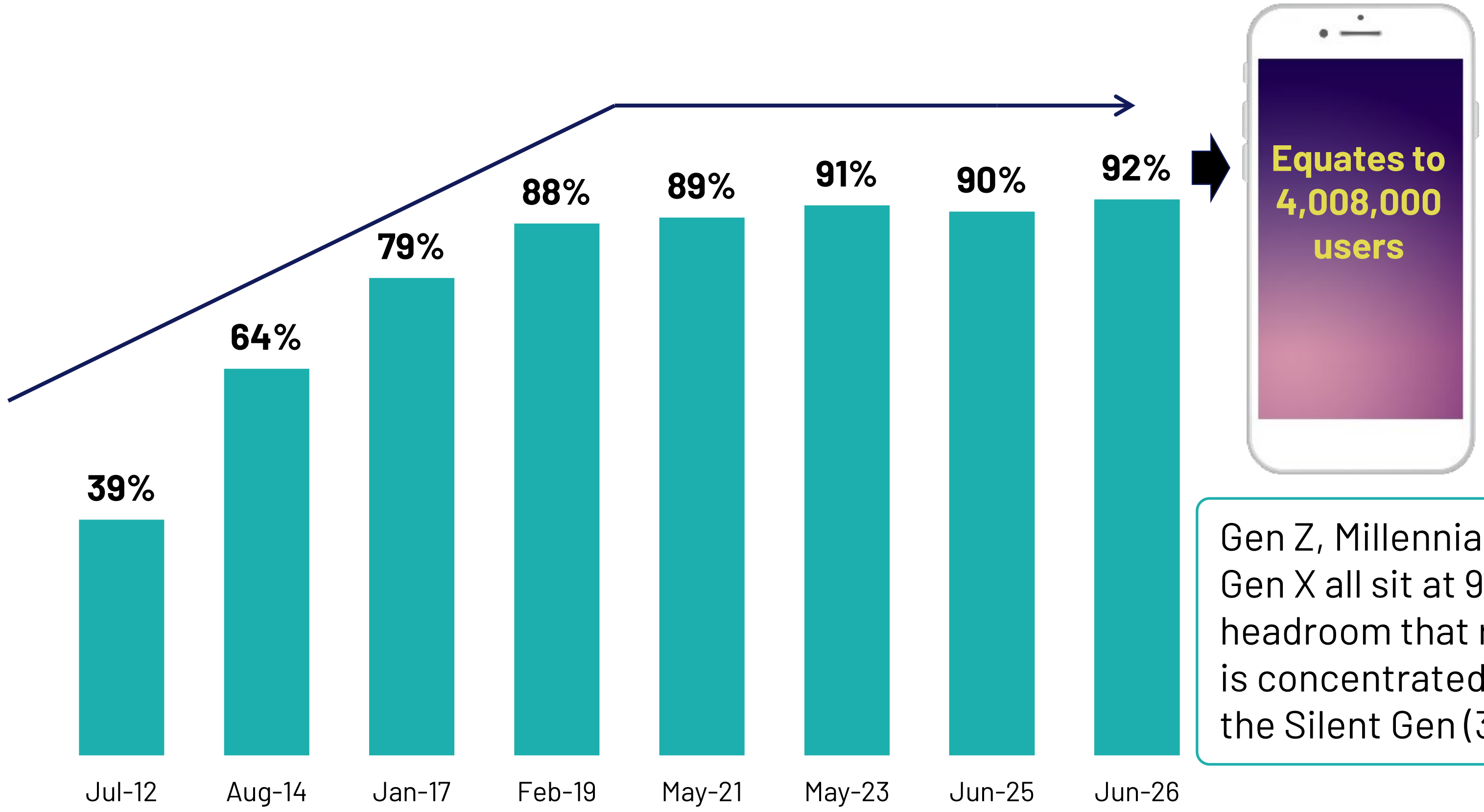
FINDINGS

PEAK DEVICES, RISING DEPENDENCE

WHILE DEVICES HAVE PLATEAUED, THE ESSENTIAL NATURE OF TECH SERVICES ARE BECOMING EVIDENT

Smart phone ownership remains near universal, while smart devices have peaked

Adoption has flattened into a plateau. After a decade of rapid uptake, from 39% in 2012, penetration has maintained around 9 in 10 in recent years.



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

Gen Z, Millennials and Gen X all sit at 97%; the headroom that remains is concentrated among the Silent Gen (31%).

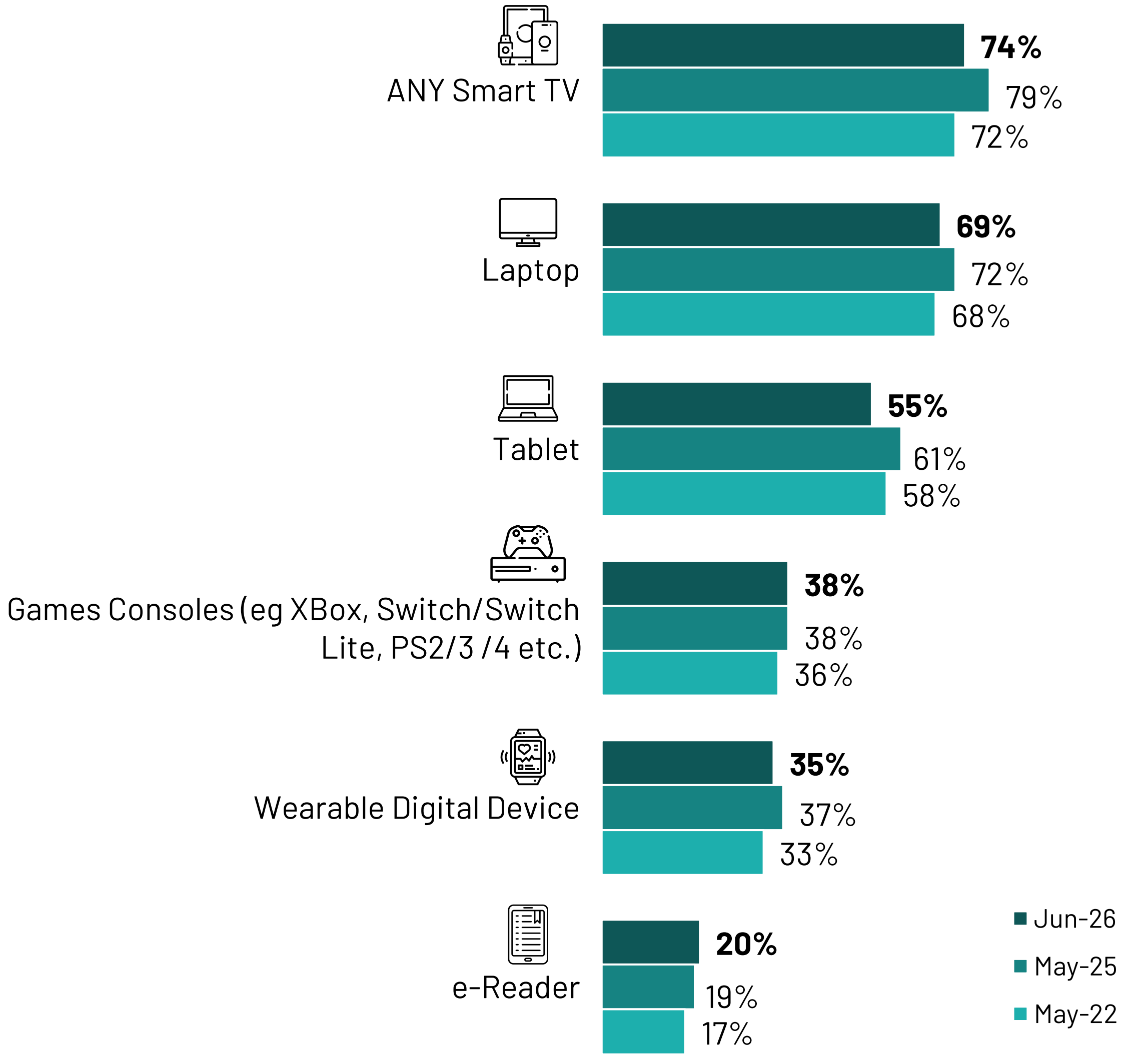
8

Smart devices in the average home; This is unchanged since 2022

Base: All respondents – 1,002
Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

Device usage has peaked; *the next chapter is about use*

Devices in Home Trended



The era of rapid hardware adoption is over

This is particularly evident in the tablet and laptop space, as smartphones become increasingly advanced – less reliance on this more "clunky" tech.

The implication

When the device base stops growing, value & growth migrates to software, services and experience. Hardware is the stage; the performance is now everything that runs on it.

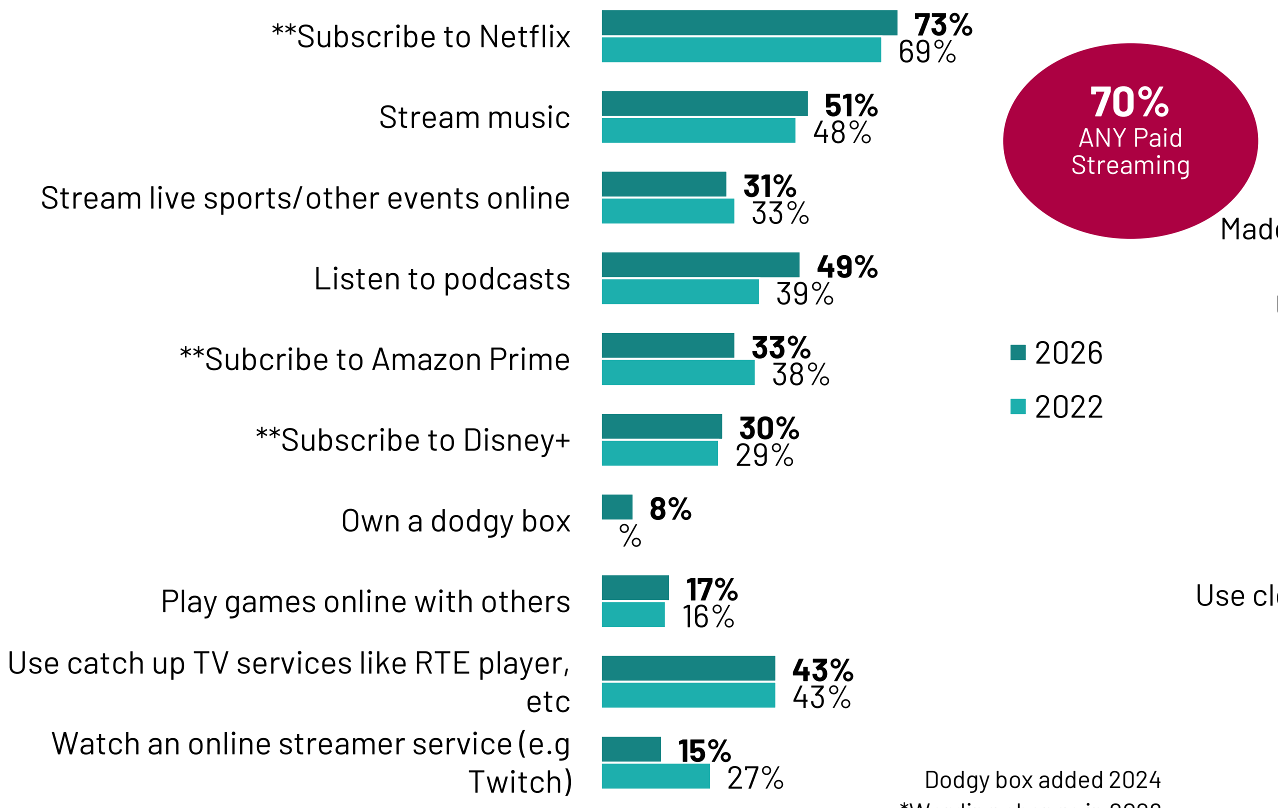
Base: All adults aged 16+ - 1,002
Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

UTILITY ONLINE SERVICES SEEING GROWTH, WHILE STREAMING IS STAGNATING

Utility services are growing while streaming has stalled somewhat

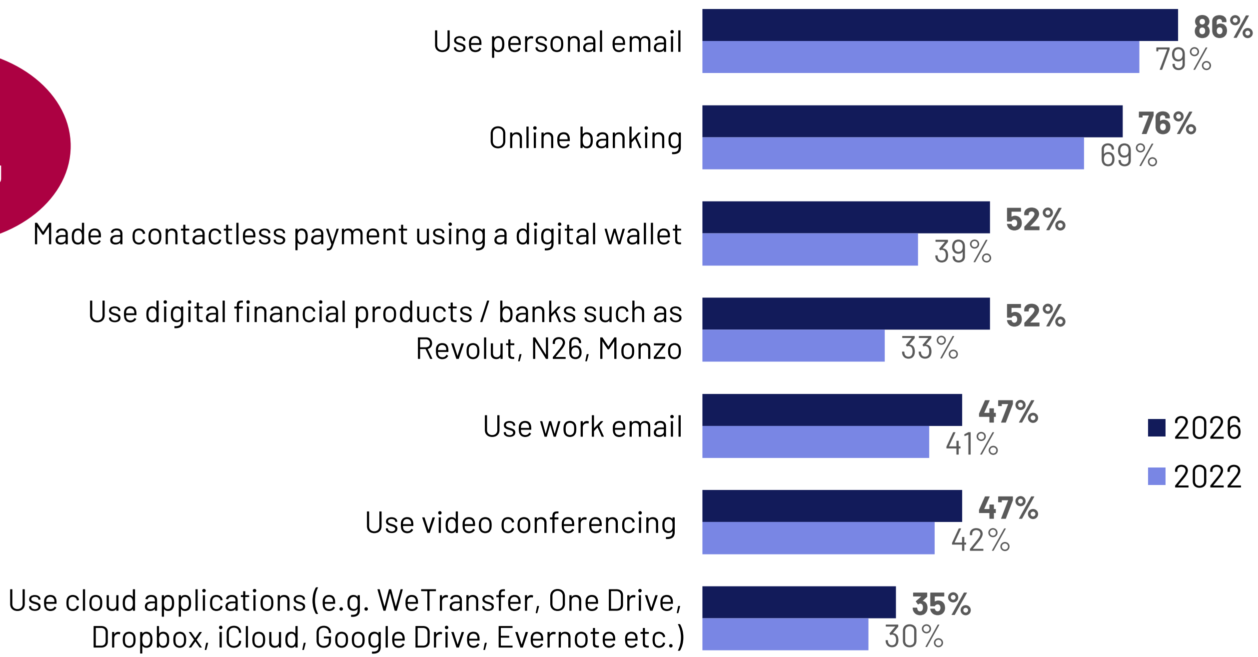
Email, banking, video-conferencing, cloud and digital finance usage are all climbing, while entertainment streaming holds steady; We are shifting technology from a discretionary entertainment platform to a non-negotiable utility.

Streaming at a standstill, with the exception of podcasts



Dodgy box added 2024
*Wording change in 2026
**Watch Netflix
**Watch Amazon Prime
**Watch Disney+
changed to subscribe to … in 2025

Technology is becoming Infrastructure



As we continue to move toward this essential service mindset, we must ensure we bring everyone with us

Silent Gen shows much lower uptake across all services

Base: All respondents - 1,002
Q.3 Which of these do you do nowadays anywhere …

BROADBAND SERVICES

VIEWED AS AN ESSENTIAL SERVICE

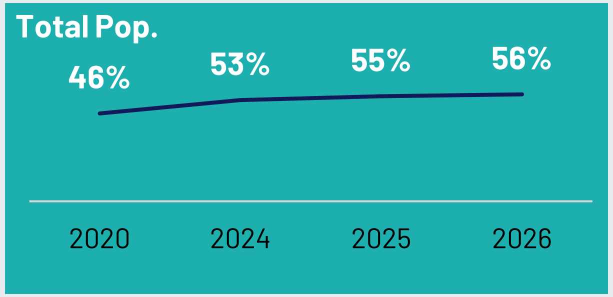
As dependency on broadband grows, the living room is changing

Live TV is losing its grip, with over half noting broadband is more important – this is high even among Baby Boomers with 1 in 3 agreeing.

Connectivity, not the broadcast schedule, is the household's organising platform.

56%

Say broadband is more important to them than TV



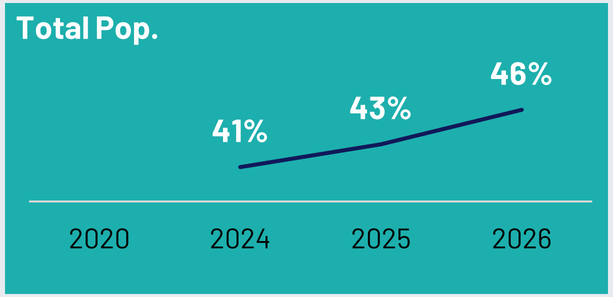
Generations

Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
72%	70%	57%	32%	15%

46%

LIVE

Say they no longer see the value in paying for live TV plans as they can access all content through streaming services



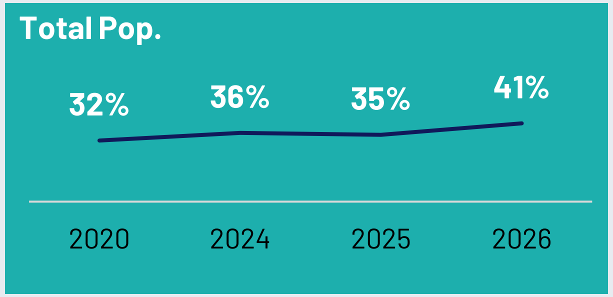
Generations

Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
63%	54%	42%	29%	9%

41%

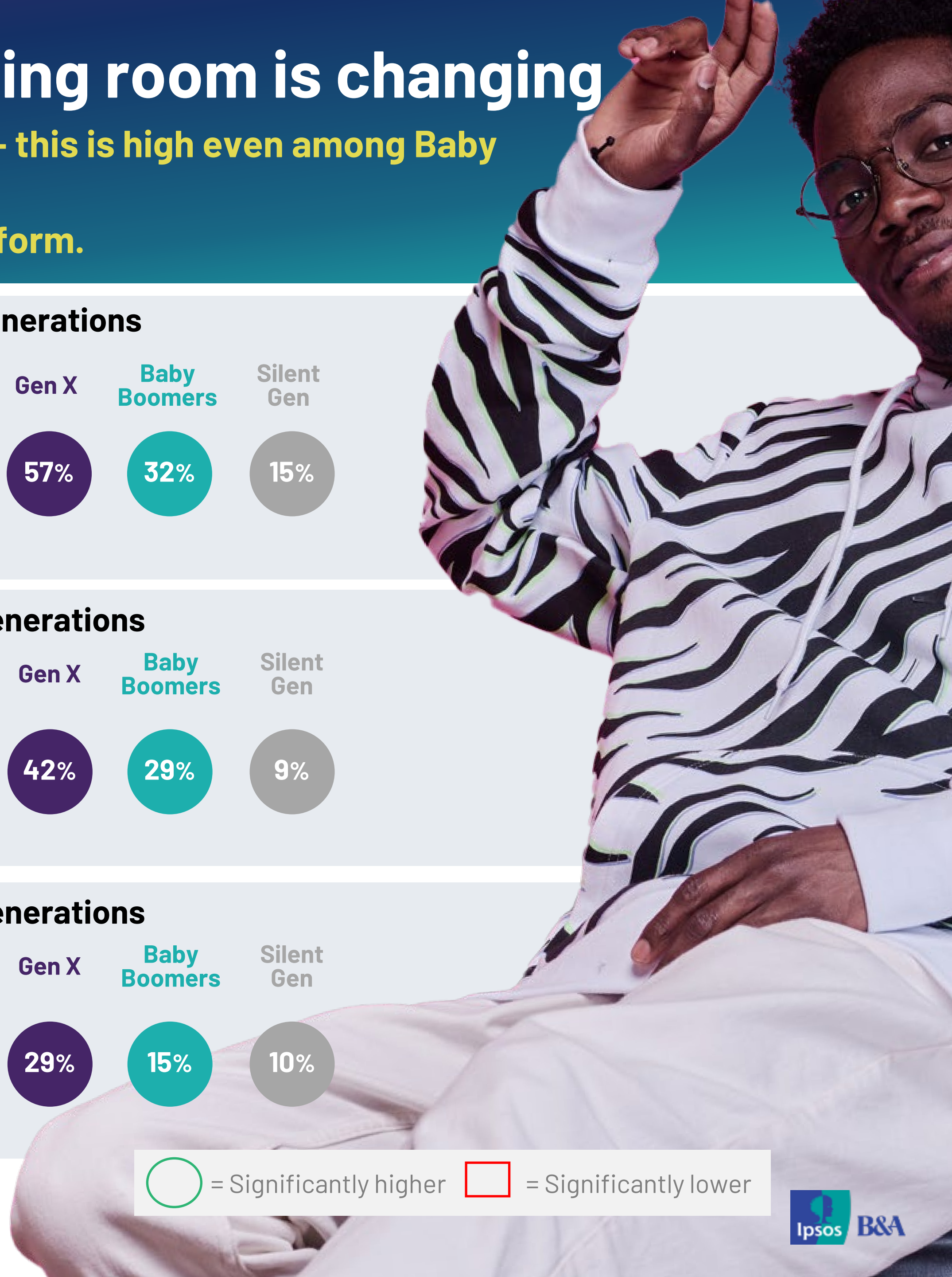
YouTube

Say they are watching more content on YouTube than on live TV



Generations

Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
73%	50%	29%	15%	10%



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Base: All Adults 16+ - 1,002
Q.13b To what extent do you agree or disagree ...

WHAT THIS MEANS FOR BRANDS / ORGANISATIONS

Peak Device, Rising Dependence

When most already own the hardware, advantage is won in the software, the service and the moment of use.

01

Compete on service, not specs

Reallocate investment from device/feature acquisition toward retention, personalisation and lifetime value. The next point of growth is depth of use, not breadth of ownership.

02

Design for the smartphone-first home

As tablets and laptops recede, treat the phone as the primary — often only — screen. Audit every customer journey for a flawless mobile experience first.

03

Accept the essential-service standard

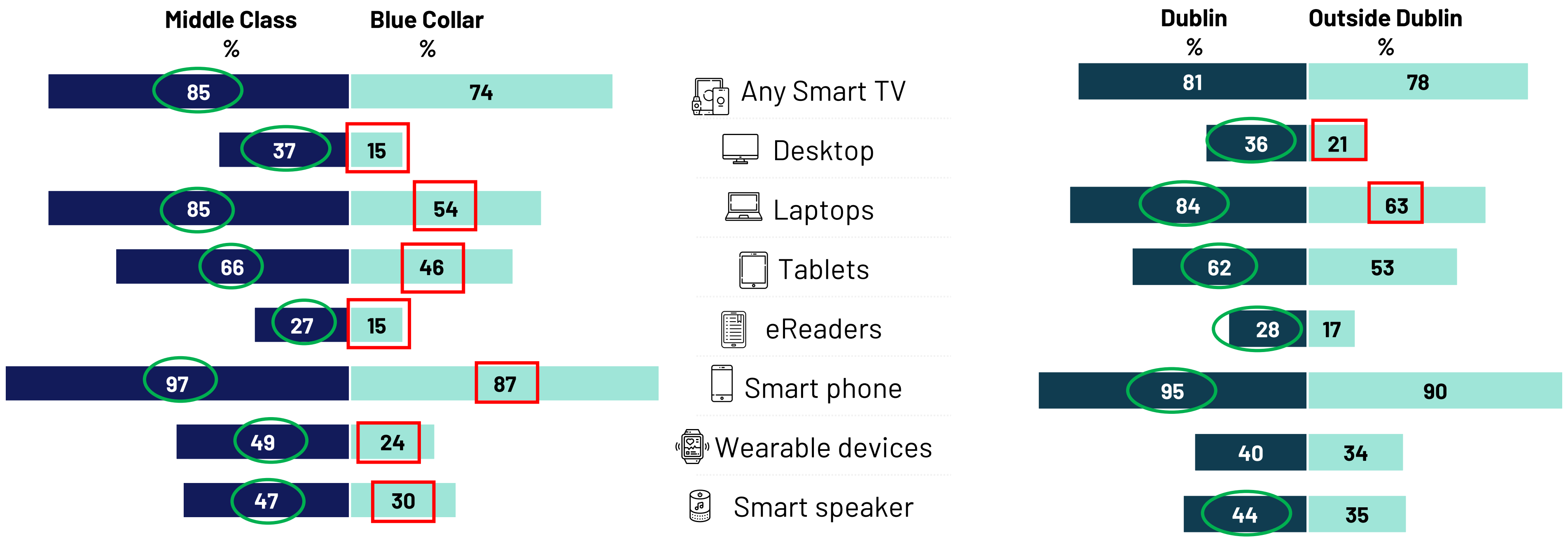
If your category has become infrastructure (banking, comms, energy, transport), reliability, accessibility and trust are now table stakes, not differentiators.

THE PERSISTENT TECH DIVIDE

CLASS, AGE, & GEOGRAPHY STILL DETERMINE WHO FULLY PARTICIPATES IN THE DIGITAL ECONOMY

A socio-economic tech divide stills runs through digital Ireland, with geography also influencing access

Middle class (ABC1) Vs Blue Collar (C2DE) and Dublin Vs Outside



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

- ABC1 10 devices
- C2DE 6 devices

Cohorts **outside Dublin are still lagging** slightly behind Dublin

- Dublin 9 devices
- Outside 8 devices

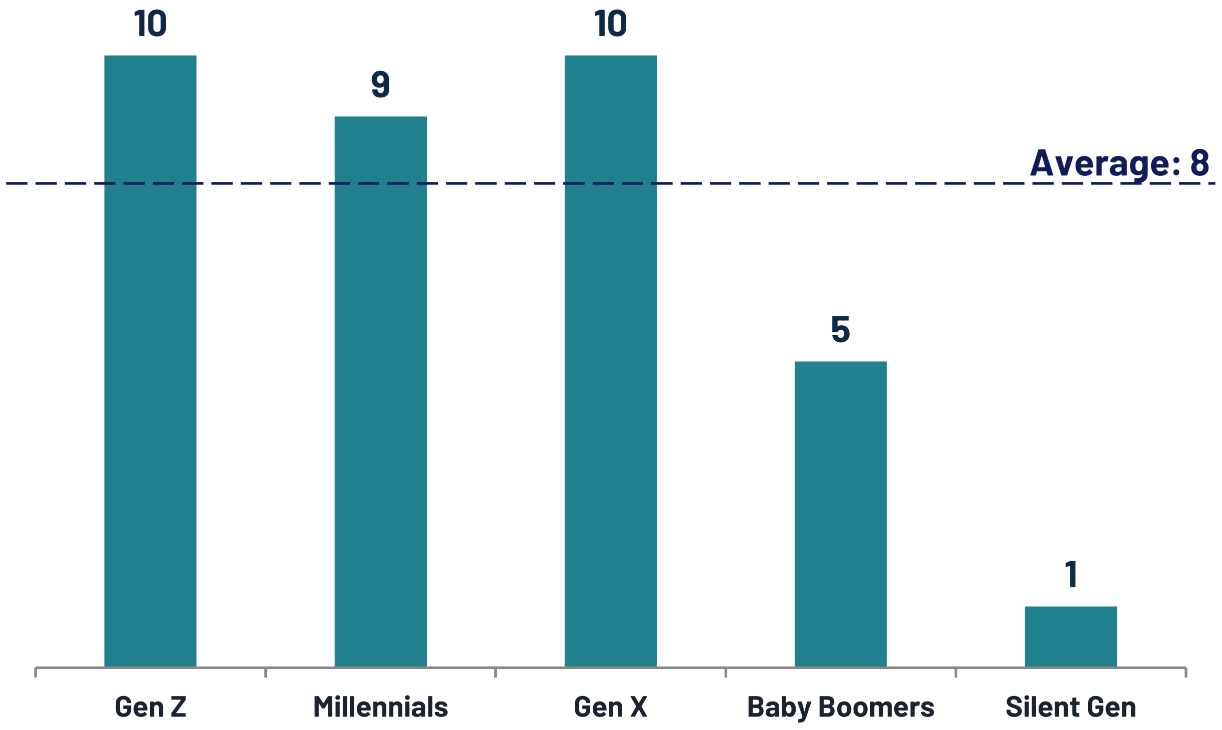
Base: All respondents – 1,002
Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

= Significantly higher = Significantly lower

The sharpest divide is generational

And it risks exclusion of older cohorts

Average smart devices in the home, by generation



Base: All respondents – 1,002

25%
of those aged 65+ never access the internet

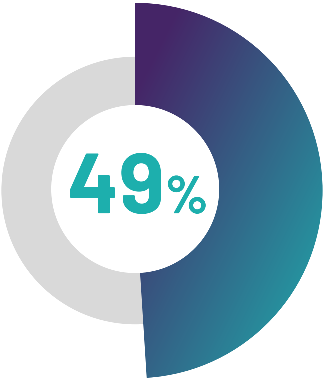
Only 24%
of over-65s feel confident keeping up with technology

A key watch-out: do not leave older Ireland behind

Daily internet use is now **89%** overall and rising even among the over-65s (59%). But **a quarter of older adults remain entirely offline, and few feel confident**. As essential services move online, this is an inclusion — and reputational — risk.

Working from home is a privilege, not a default

Any work from home among workforce



1 in 4
WFH on a daily basis

Area	
Dublin	64%
Outside Dublin	42%
Class	
ABC1	60%
C2DE	30%

Two-tier flexibility

Remote work has become a permanent feature – but access is concentrated among the Dublin-based middle class. Blue-collar workers are half as likely to have the option as their counterparts.

Flexibility is becoming a marker of advantage – with talent, wellbeing and fairness implications for employers.

Base: All working 597

Q.15 At the moment how often, if at all, do you work from home during the working week?

= Significantly higher = Significantly lower

There are also clear generational divides in perspectives on AI and new technology

While Gen Z clearly shows openness to new technologies, this is much less common among Baby Boomers and Silent Gen cohorts. Furthermore, Gen X show highest levels of concern around job loss.

	Any agree 2026	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
		195	281	239	255	32
		%	%	%	%	%
I fear that AI tools like ChatGPT, etc. will replace many peoples' jobs	71%	65	75	78	69	42
*New technology is essential for Ireland's prosperity	71%	78	70	73	68	44
I fear that AI tools like ChatGPT, etc. will hinder students' ability to learn in schools & universities	67%	62	71	72	64	38
I am concerned about the environmental impact of AI systems	60%	57	66	60	57	39
*I am confident I can keep up with the new technologies as they affect my life	60%	81	74	61	30	14
*The government should do more to encourage the introduction of new technology	57%	65	58	57	53	33
*Technological development poses a considerable threat to mankind	56%	53	58	61	55	44

Generations

* New statement 2026

Base: All adults 16+ - 1002

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

= Significantly higher = Significantly lower

WHAT THIS MEANS FOR BRANDS / ORGANISATIONS

The Persistent Tech Divide

Digital saturation is not the same as digital inclusion. The unserved minority is now a strategic, regulatory, and moral concern.

01

Keep the personal channels open

For essential services, an **online-only model excludes the quarter of over-65s who are offline**. Maintain assisted and offline routes.

02

Segment by access, not just age

Access is multifaceted; **class and confidence drive participation** as well as age. Build **affordability and onboarding support** for lower-income cohorts who own fewer devices and engage less.

03

Make flexibility fair, where possible

Where remote work is possible, extend it beyond the Dublin middle-class core. Uneven access to WFH can become a fault line in talent attraction and retention.

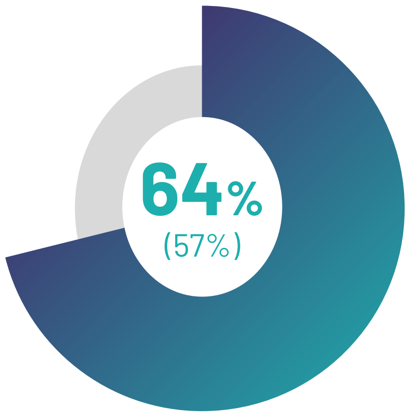
THE TRUST DEFICIT

PRIVACY ANXIETY IS RISING & AD TARGETING BREEDS RESENTMENT

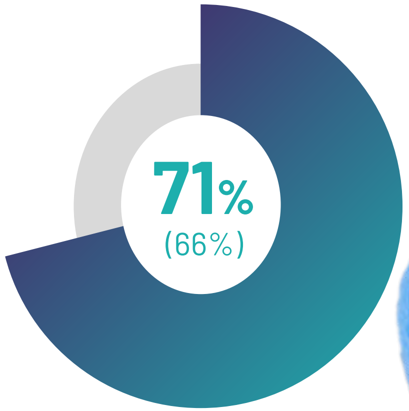
Concern about data is rising sharply – and broadly

Privacy concern spans every digitally engaged generation, peaking among Gen X.

Worry about data privacy online



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



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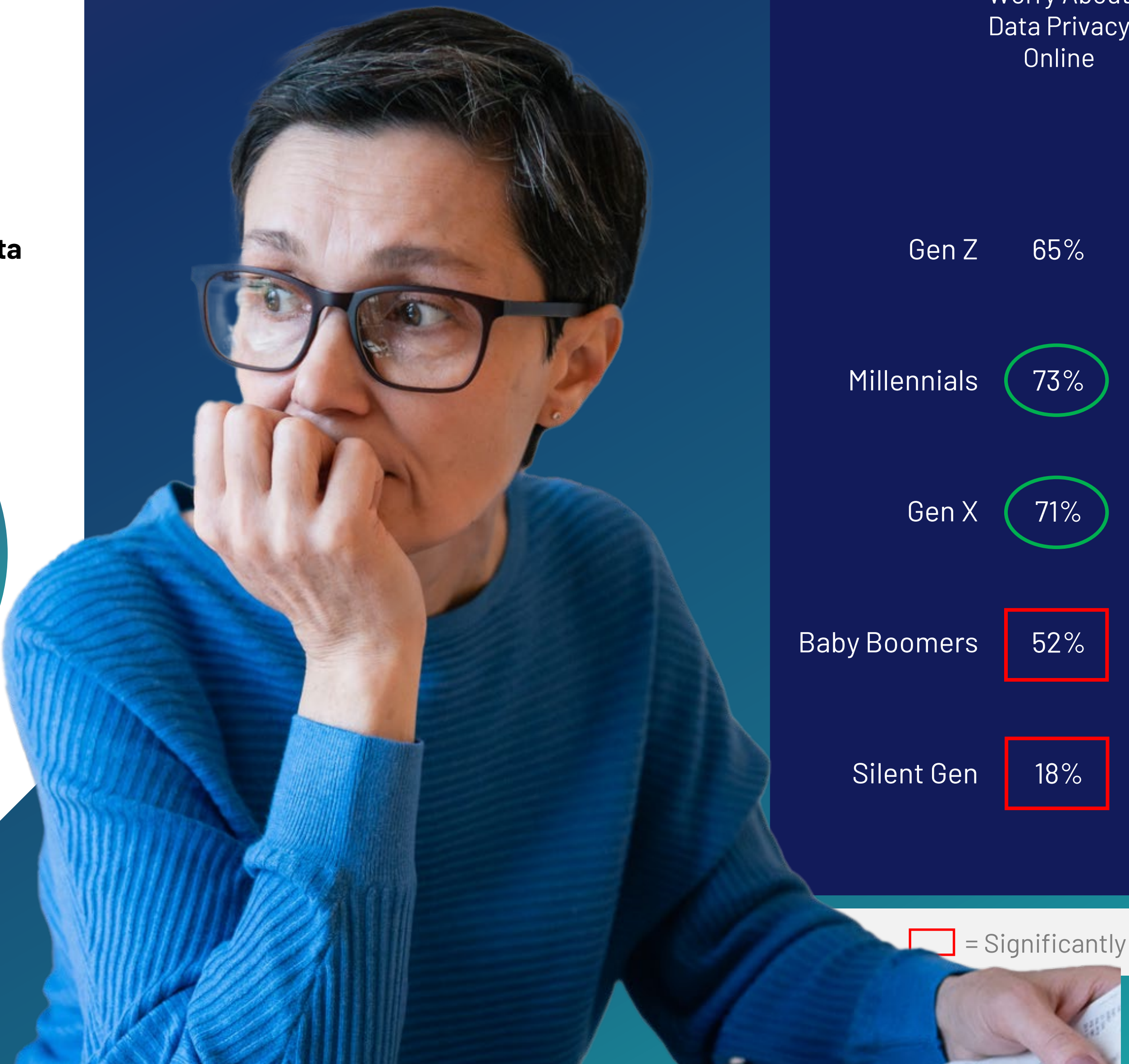


Generations

	Worry About Data Privacy Online	I am concerned in general nowadays regarding how my data is used by organisations
Gen Z	65%	70%
Millennials	73%	74%
Gen X	71%	77%
Baby Boomers	$\boxed{52\%}$	65%
Silent Gen	$\boxed{18\%}$	$\boxed{39\%}$

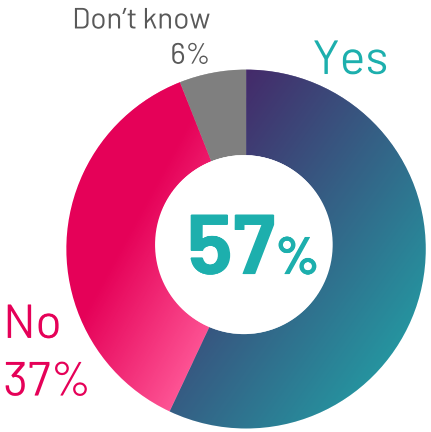
$\boxed{}$ = Significantly lower

Base: All respondents n – 1,002
Q.8 Which, if any, of the following do you ever do nowadays?
Q.13 To what extent do you agree or disagree with each of the following statements?

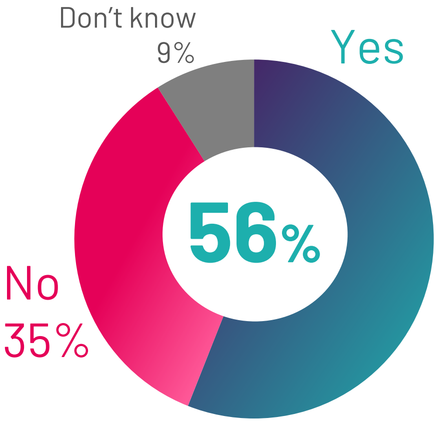
There is strong recognition of targeted ads

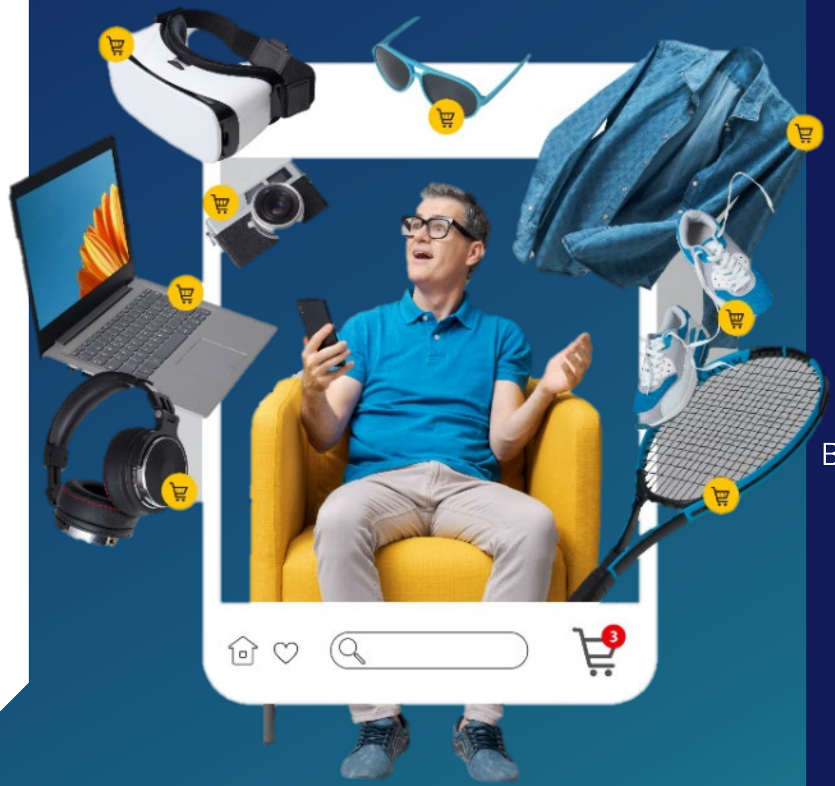
A majority of the population feel they have been targeted by ads while browsing, with 56% also feeling they have been targeted with ads based on factors external to their browsing history.

Feeling targeted by advertisements



Ad targeted you based on factors outside of browsing habits





Generations

	Targeted by advertisement	Targeted by ads based on browsing habits
Gen Z	61	66
Millennials	65	65
Gen X	65	62
Baby Boomers	43	38
Silent Gen	4	2

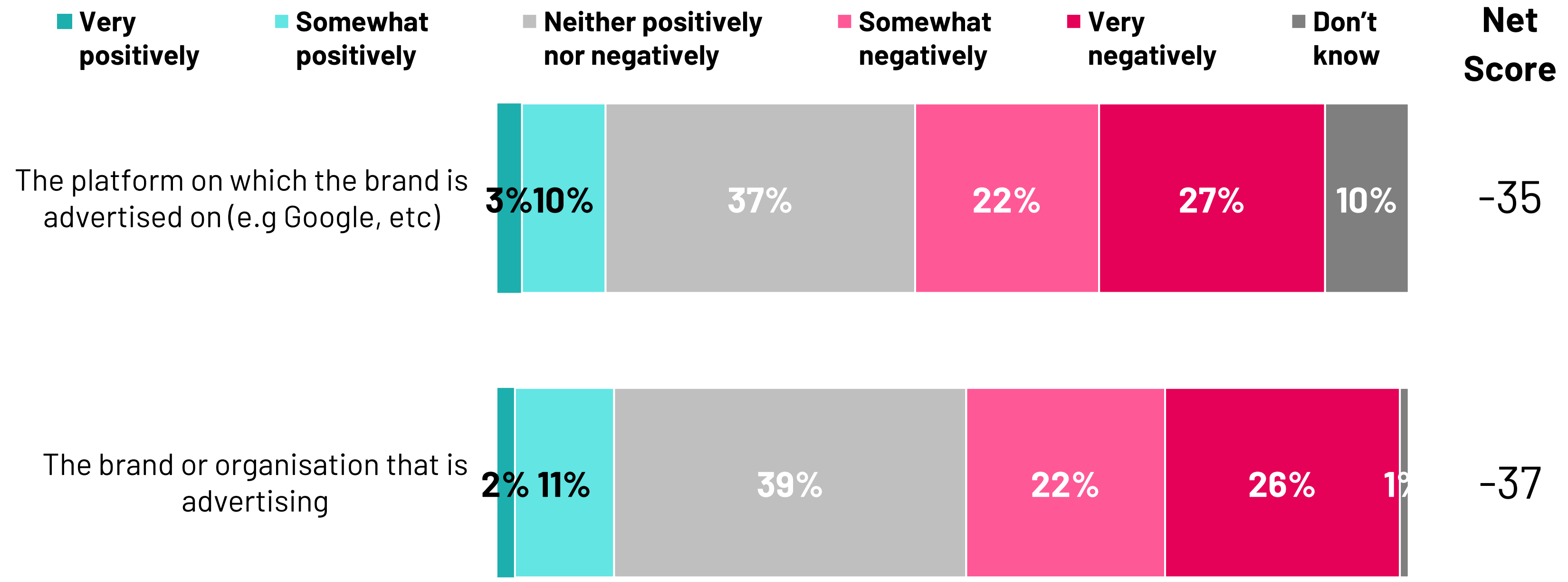
Once again, older, less digitally engaged cohorts are less impacted.

= Significantly higher = Significantly lower

Base: All respondents 1,002
Q.7 When using a device to access the internet, have you ever felt conscious of being targeted by advertisements?
Q.7a Have you ever felt that an ad has targeted you based on factors external to your browsing habits (e.g. conversations you had with people)?

Targeted ads leave a sour taste in many consumers' mouths

The impact is two-fold; negative perceptions are assigned to the brand being advertised almost as much as the platform that the ad is appearing.



Hyper-targeting that feels invasive can erode the brand equity the campaign is trying to build.

Generations

	The platform on which brand or organisastion is advertised on (e.g. Google, Instagram, TikTok, etc.)	The brand or organisation that is advertising
Gen Z	-33	-30
Millennials	-30	-28
Gen X	$\boxed{-44}$	-41
Baby Boomers	$\boxed{-45}$	$\boxed{-49}$
Silent Gen	-100	-100

All generations view the targeting in a negative way, though this is most pronounced among older cohorts.

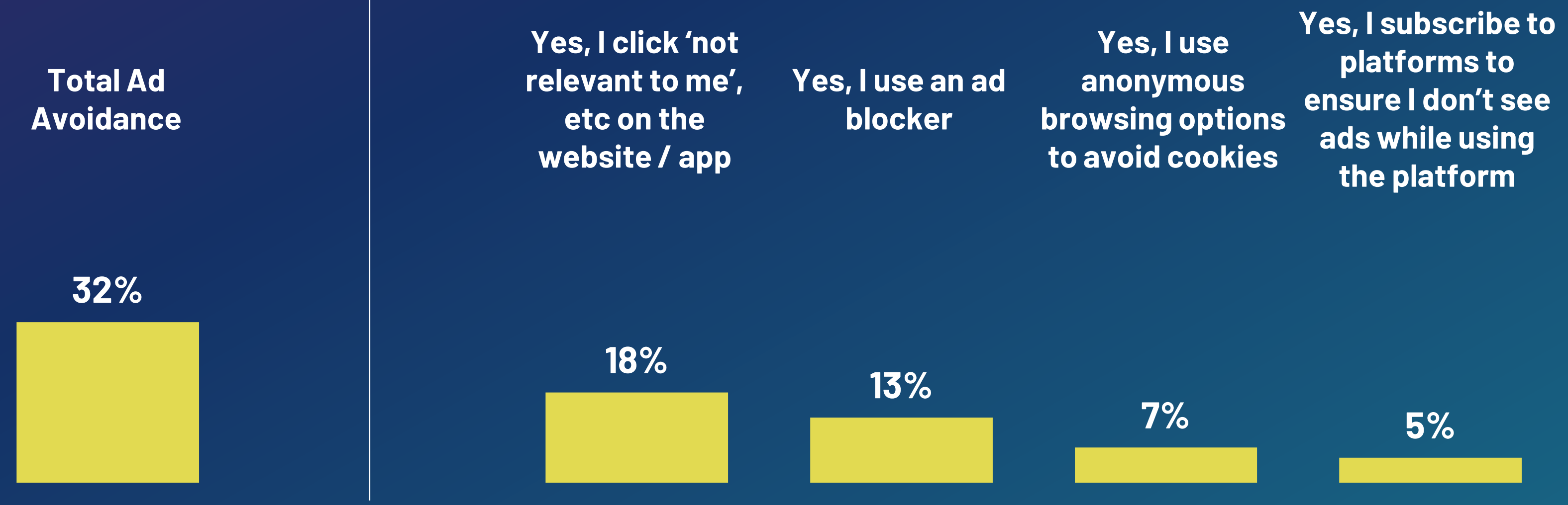
= Significantly higher = Significantly lower

Base: All respondents noting targeted ads n – 580
Q.7b When you receive targeted adverts, how do you tend to feel about ...

1 in 3 of consumes are finding ways to avoid ads

The most commonly cited approach to ad blocking is clicking 'not relevant to me' on advertisements online, while 13% use an ad blocker.

How consumers avoid online advertising



Generations

	Any Yes Total Usage
Gen Z	44%
Millennials	40%
Gen X	31%
Baby Boomers	18%
Silent Gen	2%

Avoidance scales with engagement

The most digitally fluent consumers — precisely the audiences brands most want — are the quickest to block, skip and opt out.

= Significantly higher = Significantly lower

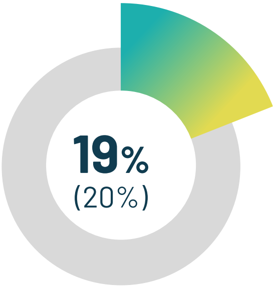
Base: All Adults 16+ - 1,002
Q.7c Do you use any of the following methods to avoid ads online?

Reaching younger generations can be achieved via influencers

Across purchasing and general engagement, we see younger generations being much more invested, with 2 in 5 of Gen Z purchasing products seen on social media / endorsed by influencers.

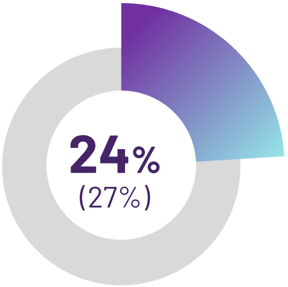
Given their high rates of ad blocking, this is a clear way to reach a key online audience.

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



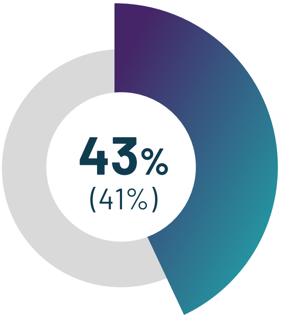
Gen Z	41%
Millennials	25%
Gen X	11%
Baby Boomers	3%
Silent Gen	-

I follow a lot of celebrities, YouTubers or "influencers"



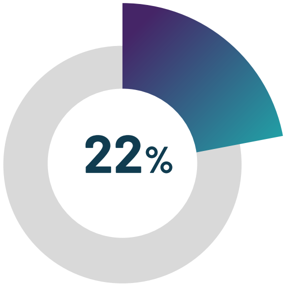
Gen Z	51%
Millennials	29%
Gen X	15%
Baby Boomers	3%
Silent Gen	2%

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



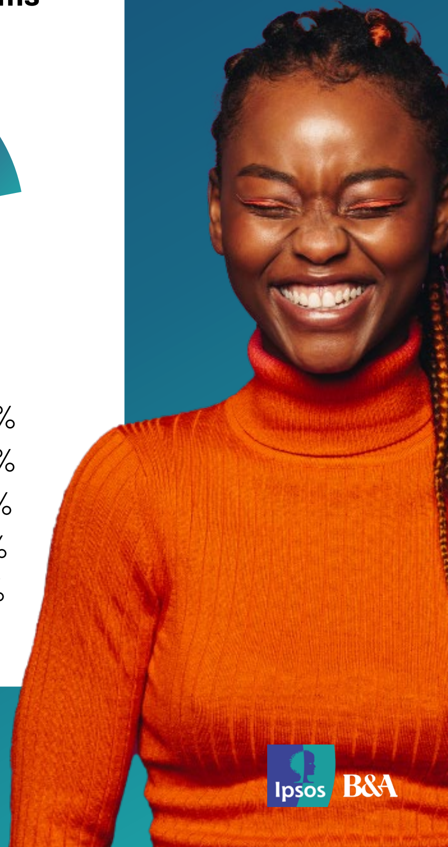
Gen Z	72%
Millennials	56%
Gen X	36%
Baby Boomers	14%
Silent Gen	6%

I purchase items I see on social media platforms



Gen Z	43%
Millennials	29%
Gen X	15%
Baby Boomers	4%
Silent Gen	-%

() = 2025 data



Base: All respondents n – 1,002
Q.8 Which, if any, of the following do you ever do nowadays?

= Significantly higher = Significantly lower

WHAT THIS MEANS FOR BRANDS / ORGANISATIONS

The Trust Recession

Consumers are fatigued by the data-driven playbook of the last decade, with many resisting engagement. A more organic, permission drive approach may be needed.

01

Trade value for data, transparently

Move from covert tracking to an explicit value exchange. Tell people what you collect, why, and what they get back — then make opting out genuinely easy. Trust compounds; resentment does too.

02

Earn attention, don't intercept it

With a third of consumers avoiding ads — rising to 44% of Gen Z — interruptive reach is not reaching as many as assumed. Invest in content, utility and first-party relationships people choose to engage with. Importance of influencers are not to be underestimated (but use appropriately).

03

Treat privacy as brand strategy

As resentment attaches to the brand, restraint is now a brand asset. Make responsible data use a visible, differentiating promise — not a compliance footnote.

THE AI PARADOX

THE MORE FAMILIAR WE ARE WITH GENERATIVE AI, THE MORE ANXIOUS WE ARE BECOMING

Generative AI usage has surged, but unevenly

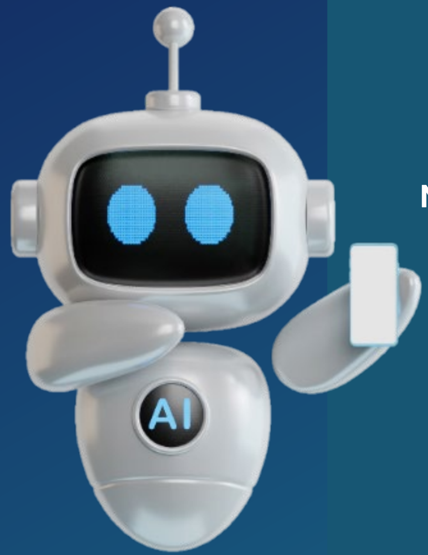
Mirrors similar younger, middle class, Dublin centric skew seen elsewhere in TechScape 2026

38% (22% in 2025)

(1,572,840 consumers)
Any use generative AI in Ireland for personal/work use

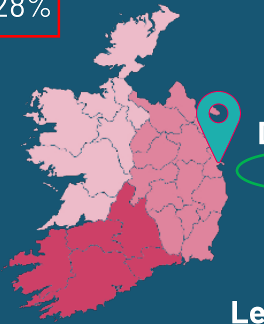
36%
Now use generative AI for **personal use**

23%
Now use generative AI for **work purposes**



Any use of AI

Region



Conn/ Ulster 28%

Dublin 58%

Leinster 33%

Munster 28%

Generations

Gen Z 58%

Millennials 50%

Gen X 38%

Baby Boomers 10%

Silent Gen -

Social class

ABC1 58%

C2DE 19%

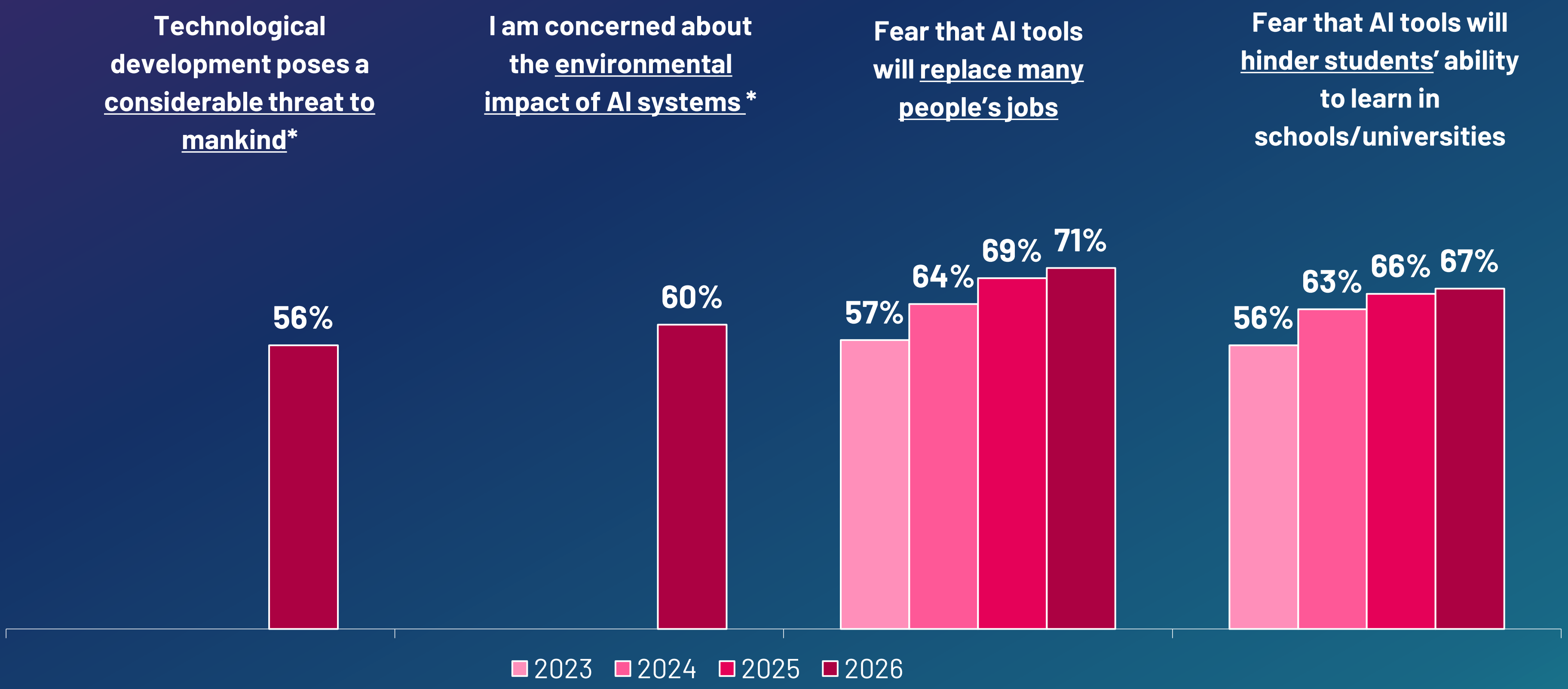
= Significantly higher = Significantly lower

Gen AI was split into two in 2026:
Use Chat GPT, Anthropic or other generative AI for **personal use**
Use Chat GPT, Anthropic, or other generative AI for **work purpose**

Base: all Adults 16+ - 1002
Q.3 Which of these do you do nowadays anywhere ...Use Chat GPT or other Generative AI *

Familiarity is breeding concern, not comfort

The adoption-anxiety paradox; unusually, deeper exposure to AI is amplifying – not calming – our fears, particularly around employment and education

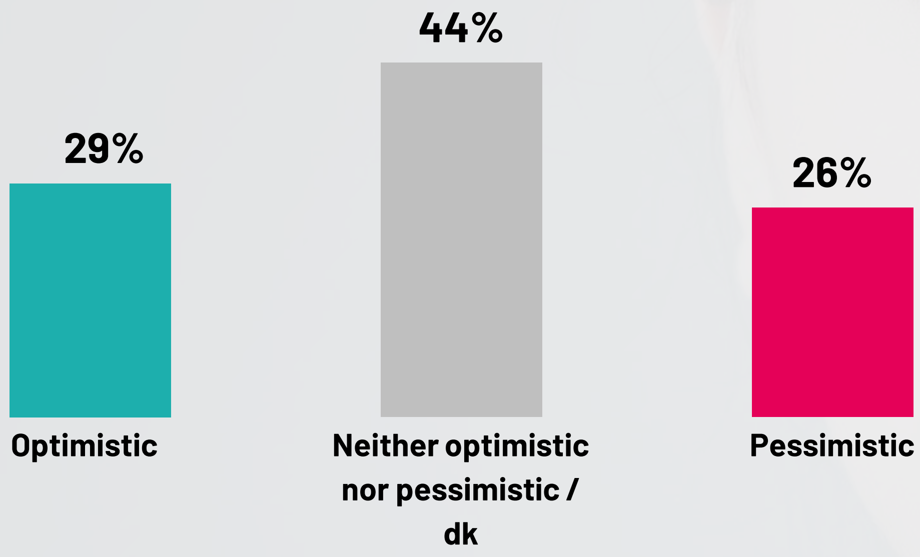


*statements added 2026

Base: all Adults 16+ - 1002
Q.13 To what extent do you agree or disagree ...

We expect the AI future – but we deeply fear much of it

How do you feel about the role that technology and AI will play in society over the next 10 years



Why are people optimistic?

Technology when used properly can increase quality of life and happiness. ***But it needs to be responsibly taught and used.***

Better job opportunities due to technology.

It can greatly help with productivity, hence ***giving people more free time to spend doing what they want to do****, creating a happier work force and society.*

I feel like ***the world will never be the same without it*** *and it's going to progress even more.*

I hope that its use is beneficial for learning. ***You hope it won't take away jobs****.*

Why are people pessimistic?

Somehow AI is leading us to more unrealistic world.

Every country's government and politicians should think where we all are going… ***we have to make a better future*** *for our kids and generations to come.*

We don't know where this is going to go.

I believe that AI is the biggest threat to jobs.

You can't tell the difference between what's real or AI generated.

It could take over*,* ***already we're becoming dependent on it to answer questions****. We might stop talking to each other in person.*

Base: All respondents n – 1,002
Q19 When you think about the next 10 years how do you feel about the role technology and AI will play in society?
Q20 Thinking about the next 10 years, to what extent do you think each of the following will happen by the year 2036?
Q.21 If each of the latter elements happened to occur, to what extent do you think it would be a good or bad thing?

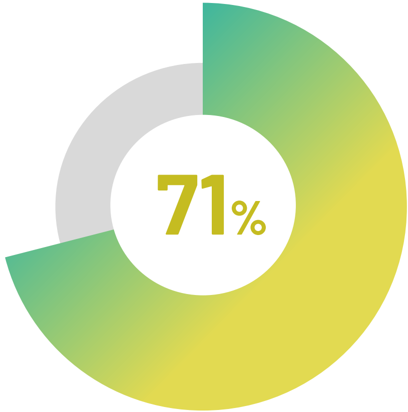
Ipsos B&A

Although we fear what comes next with AI & technology, we understand its importance and believe in our ability to adapt to advancements

We recognise the economic benefits at an overall sense, and we have a strong belief in our own abilities.

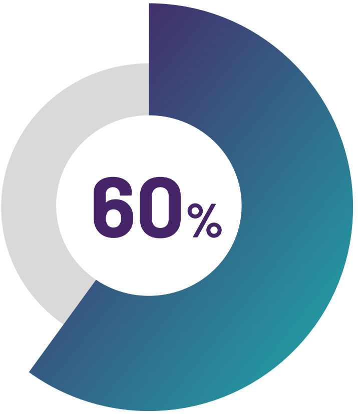
AGREE

New technology is essential for Ireland's prosperity



Gen Z	78%
Millennials	70%
Gen X	73%
Baby Boomers	68%
Silent Gen	44%

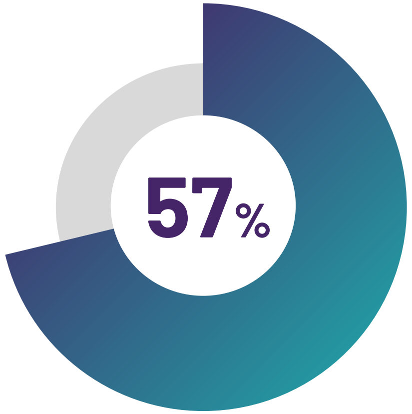
I am confident I can keep up with the new technologies as they affect my life



Gen Z	81%
Millennials	74%
Gen X	61%
Baby Boomers	30%
Silent Gen	14%

Key watch out area

The government should do more to encourage the introduction of new technology



Gen Z	65%
Millennials	58%
Gen X	57%
Baby Boomers	53%
Silent Gen	33%

Base: All respondents - 1,002
Q.13 To what extent do you agree or disagree with each of the following statements?

WHAT THIS MEANS FOR BRANDS / ORGANISATIONS

The AI Paradox

Ireland sees AI as an inevitable force that will become fully embedded in our society. However, whether this manifests as a benefit or a hazard is still an unknown for most.

01

Deploy AI where trust is already high

Lead with the use cases the public welcomes — health, home, mobility, everyday assistance. Be careful of the lightning-rod applications (job replacement, synthetic content, opaque targeting) where possible.

02

Be radically transparent about AI

With 67% fearing job loss and a majority wary of indistinguishable AI content, disclosure is non-negotiable. Label AI-generated content and keep a visible human in the loop.

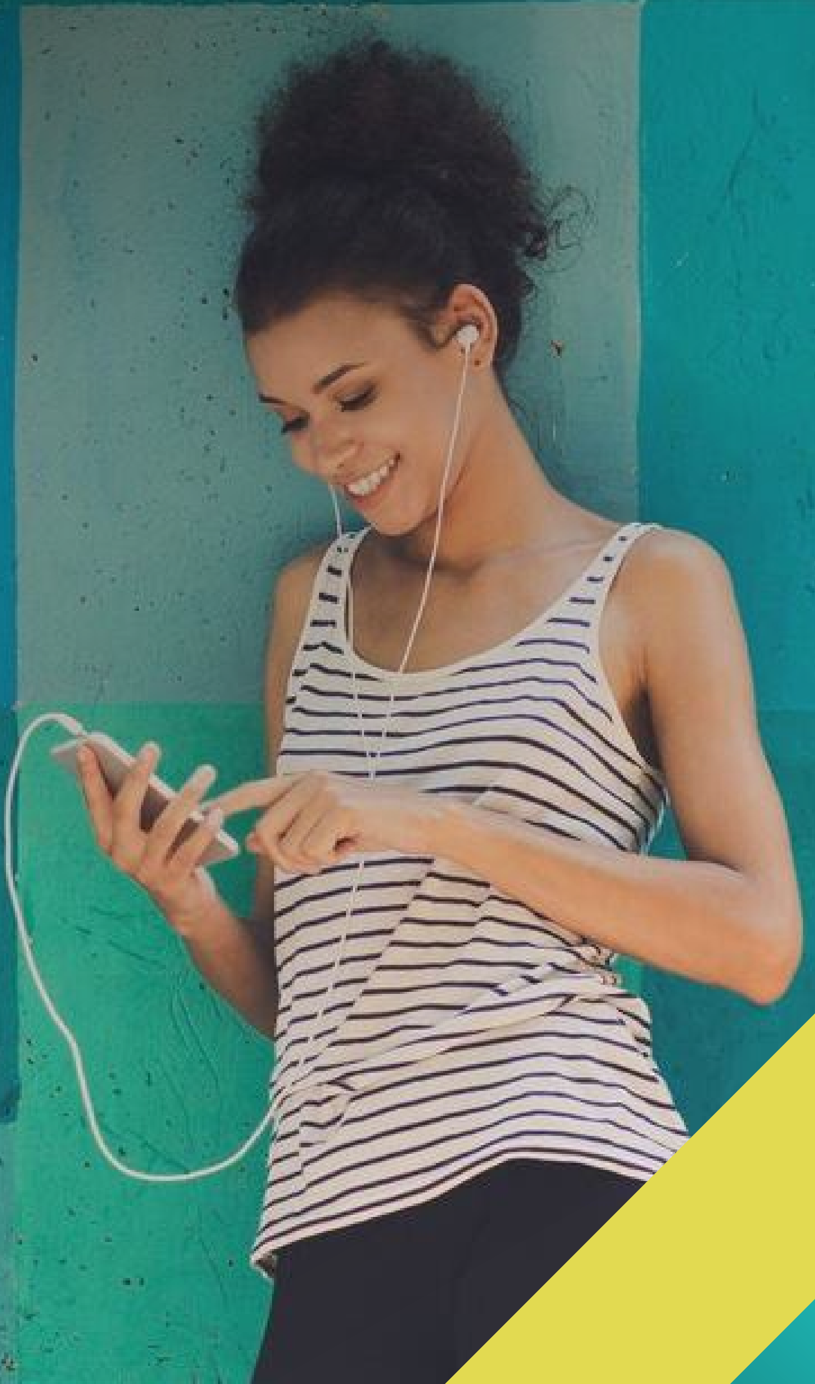
03

Leverage the benefits of new tech & AI

Regardless of fears around AI, there is a pragmatic understanding of the economic prosperity that could await Ireland as a result of this new tech. This needs to be amplified.

THE ATTENTION & WELLBEING RECKONING

THE ALWAYS-ON LIFESTYLE HAS A COST



Ipsos B&A

We are finding it harder to switch off

35% (25% in 2025)

check work email while on holiday

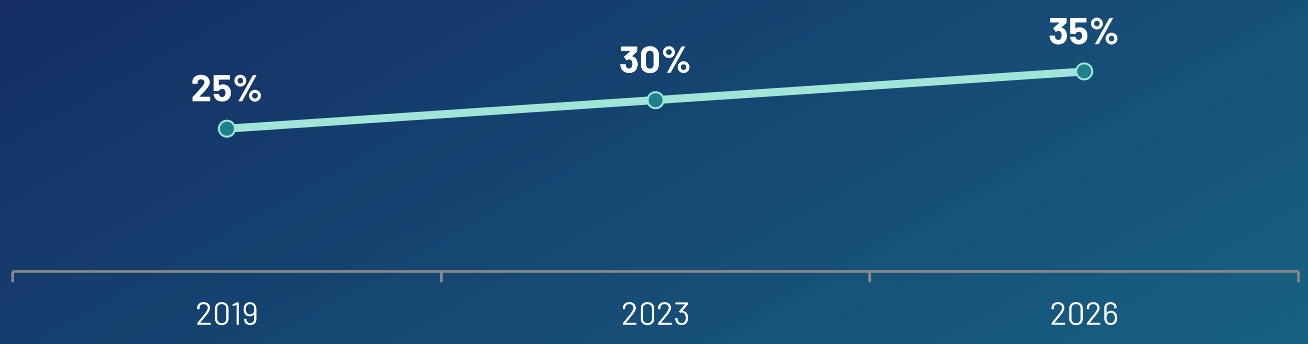
31% (28% in 2025)

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

2 in 5 (37% in 2025)

say technology is harming family life at home

Checking work email on holiday, 2019–2026 (%)



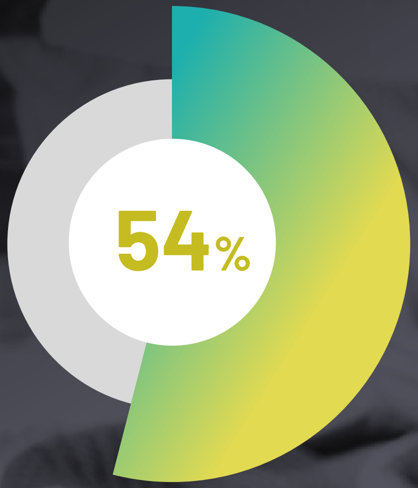
Base: All respondents - 1,002

A wired-in workforce

The post-Covid blend of remote work and always-available devices has eroded the boundary between on and off. Millennials — mid-career, multiple demands — are the most wired-in, most likely to check email out-of-office and their phones at night.

Our phones are often the first thing we see in the morning and the last thing we see at night, demonstrating our dependency

The first thing I do in the morning is check my phone



Age

Under 50	50+
68%	36%

The last thing I do at night is check my phone

Age

Under 50	50+
69%	34%

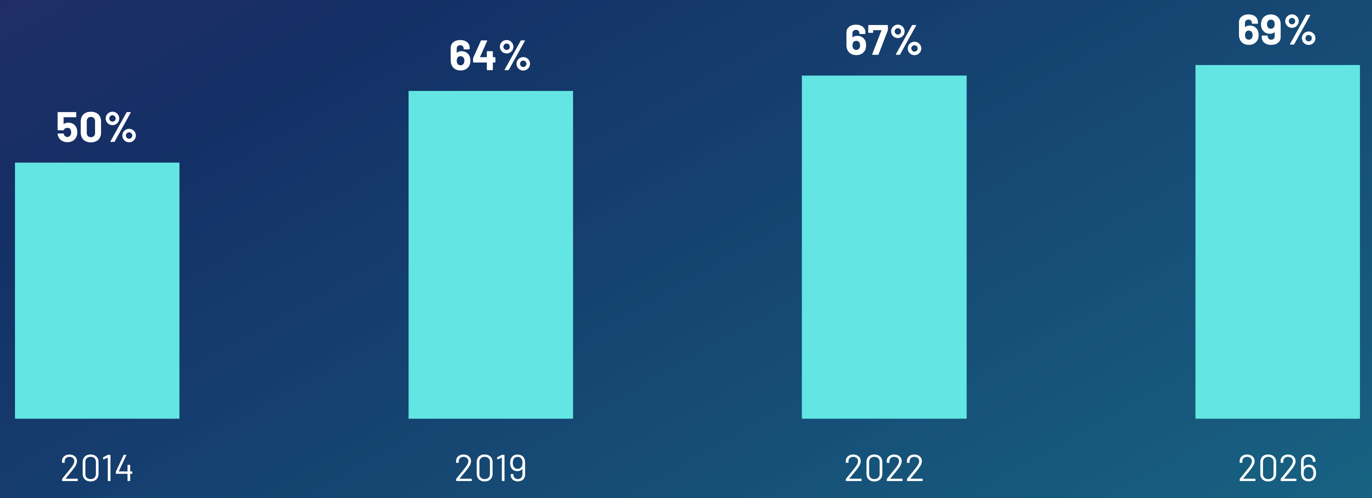
Base: All Respondents n – 1,002
Q6 To what extent do you agree with the following statements?

Significantly higher Significantly lower

Just under 7 in 10

feel we have lost the art of conversation; albeit we appear to be levelling out

"People have lost the art of conversation"



Age

	2019 %	2022 %	2024 %	2025 %	**2026 %**
16-24	47	52	58	49	**52**
25-34	54	62	57	70	**60**
35-49	62	64	68	66	**71**
50-64	69	75	74	73	**73**
65+	60	74	74	81	**80**

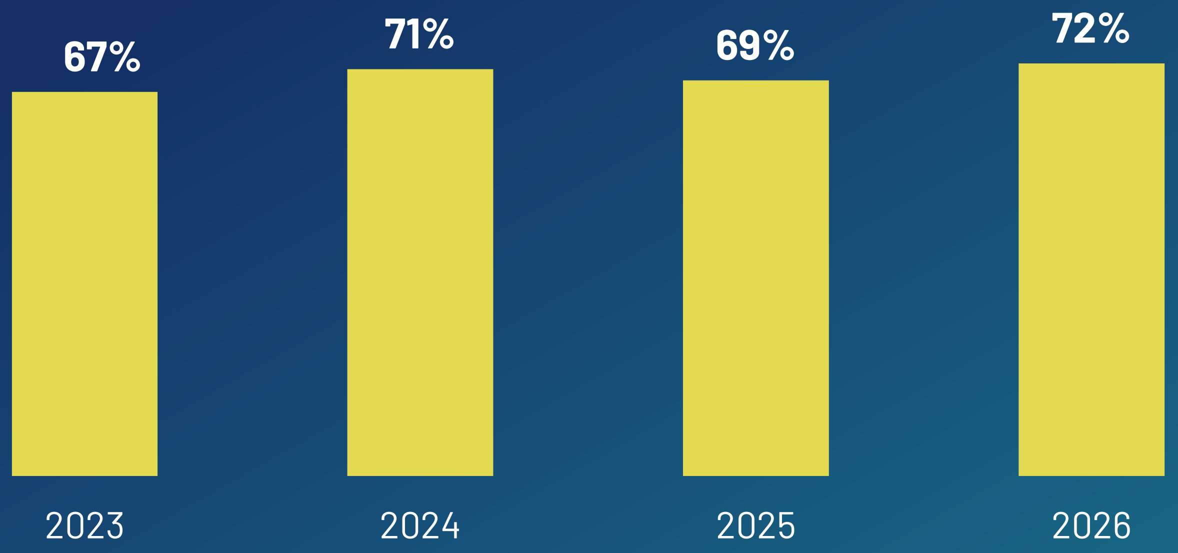
Though under 35s are less likely to agree, the majority do, showing the widespread perception that conversation is being lost.

= Significantly higher = Significantly lower

Base: All Respondents n – 1,002
Q14 To what extent do you agree with each of the following?

Worries around children’s ability to communicate in person continue to creep up

“I worry that children's ability to communicate in person has been stunted due to technology”



Lifestage

	2025 %	2026 %
Single	62	**68**
Pre Family	50	**71**
Family Pre-School	71	**74**
Family Pre-teen	74	**77**
Family Teen	85	**77**
Empty Nester	78	**75**

Having children was a previous determinant for concerns in this space, though this is less so the case in 2026.

= Significantly higher = Significantly lower

Base: All Respondents n – 1,002
Q14 To what extent do you agree with each of the following?

7 in 10

feel that social media has worsened relations between different groups of people

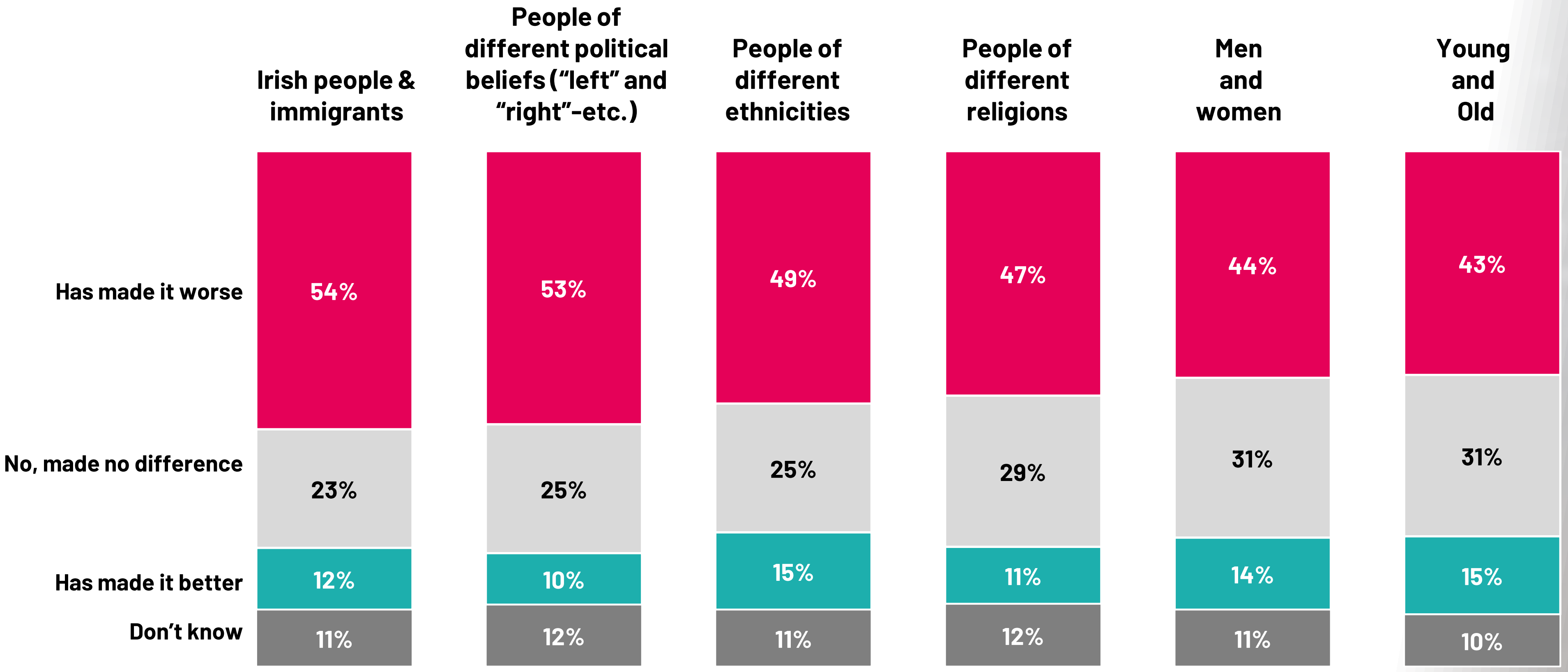
Generations

Gen Z	69%
Millennials	69%
Gen X	73%
Baby Boomers	68%
Silent Gen	38%

Concern around deterioration are clear across generations that are more engaged online

Base: All respondents n – 1,002
Q16 Thinking about society today, to what extent do you think social media and technology have made relationships and understanding between different groups better or , worse or has it made no difference?

Impact of Social Media



7 in 10
note worsening relations regarding at least one subject

Base: All respondents - 1,002
Q16 Thinking about society today, to what extent do you think social media and technology have made relationships and understanding between different groups better or, worse or has it made no difference?

57%

of women under 35 have witnessed or experienced gender-based harassment online

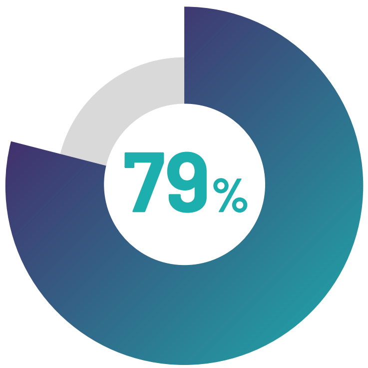
This compares to 36% in the total population

Base: All respondents - 1,002
Q.17 Thinking about social media and technology, to what extent do you agree or disagree ...

There is very high exposure to both ends of the body image scale

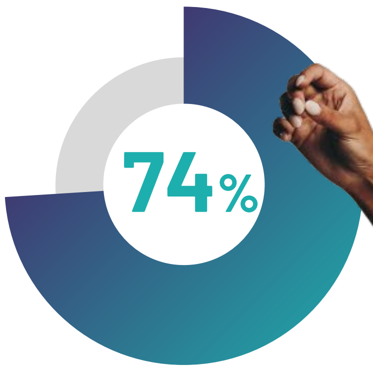
Both positive and negative content focusing on physique is rampant with at least 2 in 3 citing these. There are no leanings in terms of gender, but generational division is clear.

Have seen "Ideal body" content on their social media feed

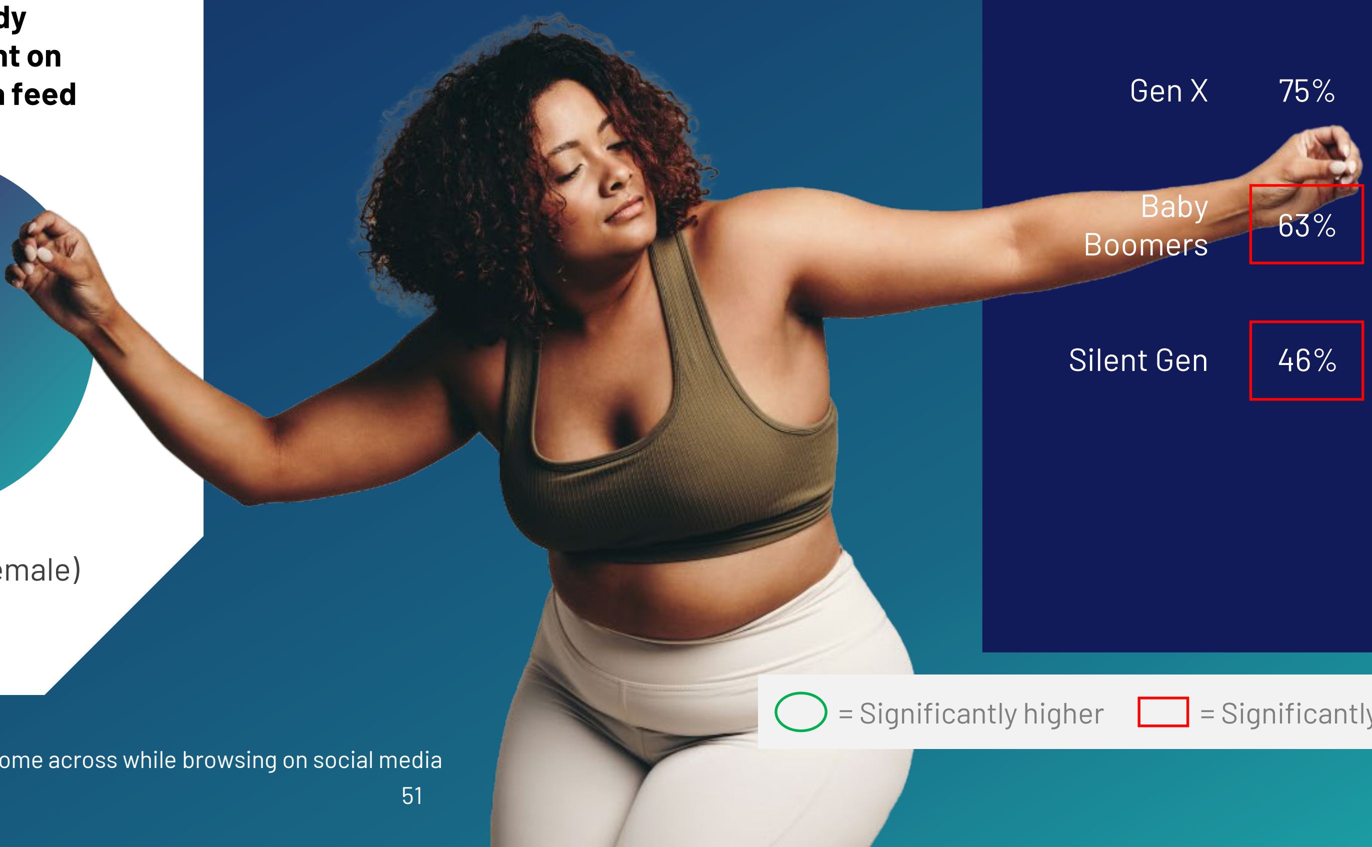


(80% Male / 78% Female)

Have seen body positivity content on their social media feed



(70% Male / 77% Female)



Generations

	"Ideal body" content	Body Positivity content
Gen Z	87%	83%
Millennials	85%	79%
Gen X	75%	70%
Baby Boomers	63%	56%
Silent Gen	46%	54%

= Significantly higher   = Significantly lower

Base: All those using social media n – 854
Q.18 In the last 12 months, which of the following types of content have you come across while browsing on social media

Social media is a gendered world

Women (particularly those under 35) see far more women's safety, feminist and "tradwife" content; "manosphere" and male-loneliness content circulates widely too.

67% recognise that men and women have very different experiences online

So how does this manifest in what people see online?

Women's safety concerns
72%
(67% Male / **77%** Female)

Feminist content
66%
(**60%** Male / **71%** Female)

Content criticising opposite gender
62%
(62% Male / 61% Female)

"Loneliness epidemic" among men
55%
(60% Male / 50% Female)

"Manosphere" content
49%
(49% Male / 49% Female)

"Tradwife" content
47%
(42% Male / 53% Female)

Younger people are seeing more of this content, but gender plays a role here too..

	U35 Males	U35 Females
Women's safety concerns	75%	87%
Feminist content	69%	85%
Content criticising opposite gender	74%	72%
"Loneliness epidemic" among men	66%	55%
"Manosphere" content	58%	63%
"Tradwife" content	46%	65%

= Significantly higher = Significantly lower

Base: all those using social media n – 854
Q.18 In the last 12 months, which of the following types of content have you come across while browsing on social media?

Ipsos B&A

A significant minority of consumers have social media fatigue

33%

have turned off social media notifications on their phone on occasion

This is most common among Dubliners (44%) & under 25s (43%) – busy lives trying to carve out some quiet time

Base: All respondents n – 1,002
Q.8 Which, if any, of the following do you ever do nowadays?

WHAT THIS MEANS FOR BRANDS / ORGANISATIONS

The Attention & Wellbeing Reckoning

Consumers are finding it hard to disconnect but can easily recognise the negative impact these platforms have had on relationships, and the social and human cost of the attention economy.

01

Respect the right to switch off

As an employer, codify boundaries — out-of-hours norms, holiday cover, "right to disconnect" practices. Wellbeing is now a retention and productivity issue, not a perk.

02

Mind your media adjacency

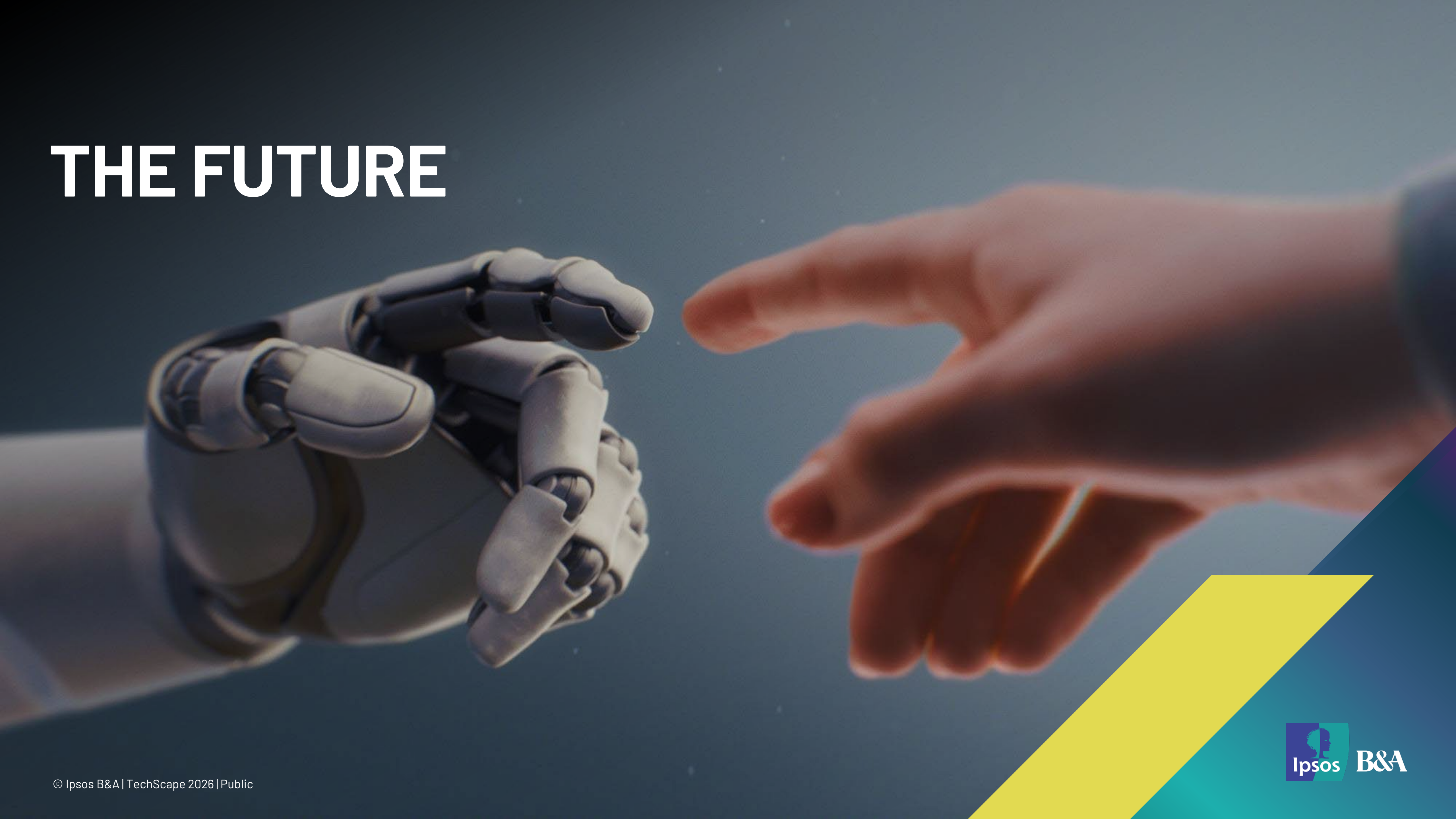
Brand messages sit inside feeds widely blamed for division and harm. Scrutinise where your spend appears — association is reputation.

03

Design for safety, especially for women

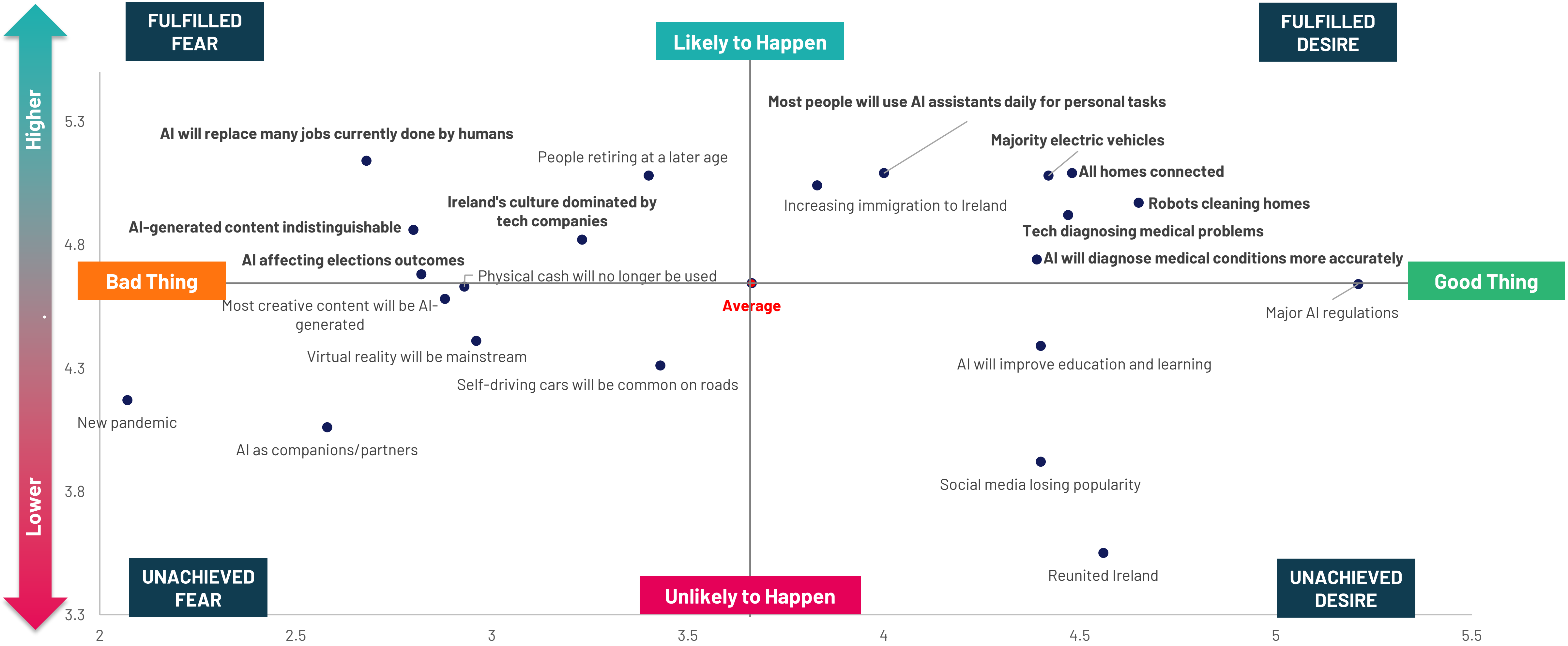
With 57% of young women experiencing or witnessing online harassment, any platform, product or campaign reaching them must build in safety by design and avoid amplifying harmful content tropes.

THE FUTURE



When considering the near future, we are clearly conflicted in our views of AI

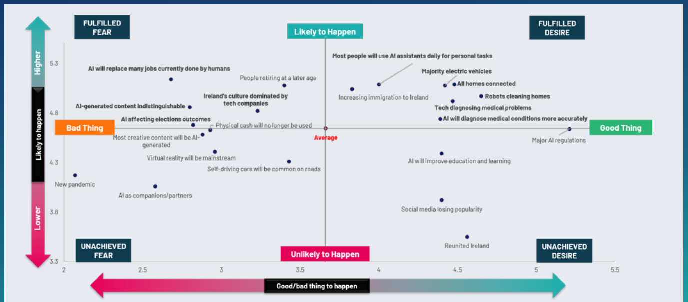
The benefits of our advancements in tech are well understood, with a focus on improvements to health, transport, home help, and assistance. However, this is paired with clear fears surrounding job losses, AI-generated content, AI influence in elections, and Irelands culture being dominated by tech companies.



Q20 Thinking about the next 10 years, to what extent do you think each of the following will happen by the year 2036?

LOOKING TO THE FUTURE

Ireland expects near-term AI utility and advancements but worries about jobs, information integrity, & cultural sovereignty



Fulfilled Desire

What desires are most likely?

All homes will be connected (ability to control lights, heating,...	67%
The majority of vehicles on our roads will be electric	67%
Daily AI assistants for personal tasks	65%
A robot will vacuum & clean your home	63%
Computers / tech will be able to diagnose illnesses	63%

How welcomed are they? (good thing %)

All homes will be connected (ability to control lights, heating,...	52%
The majority of vehicles on our roads will be electric	52%
Daily AI assistants for personal tasks	39%
A robot will vacuum & clean your home	57%
Computers / tech will be able to diagnose illnesses	54%

Fulfilled Fear

What fears are most likely?

AI will replace many jobs done by humans	66%
AI-generated content will be indistinguishable from human-created content	59%
Ireland's culture will be dominated by technology companies	59%
AI will be used to affect the outcomes of elections and influence public...	56%
Physical cash will no longer be used	56%

How feared are they? (bad thing %)

AI will replace many jobs done by humans	68%
AI-generated content will be indistinguishable from human-created content	65%
Ireland's culture will be dominated by technology companies	54%
AI will be used to affect the outcomes of elections and influence public...	64%
Physical cash will no longer be used	61%

SO WHAT?

Brands and organisations must lean into near-term, high-utility AI while visibly leading on people first labour strategies, content authenticity, election integrity, and cultural commitment in Ireland. This aligns with where the public sees value and directly addresses where they expect harm.

IN SUMMARY

In Summary

1

The Hardware Era is Over – The Service Revolution Begins

We have reached "peak device" with a steady 8 devices on average per household across multiple years. Growth no longer comes from selling screens but from the experiences that run on them.

A move from device acquisition to service excellence is underway.

2

Digital Commerce is Booming, but Divided

Among younger cohorts, digital commerce is well engrained. However for older people this is less so the case. For example, 78% of Gen Z shop for clothes online, compared to just 32% of Baby Boomers.

Where division is that prominent, digital commerce risks becoming a privilege rather than progress.

3

Digital Inclusion is Ireland's Next Infrastructure Challenge

25% of over-65s remain completely offline and only 1 in 4 over 65s feel confident that they can keep up with advancements in technology, while online services are becoming increasingly essential. The divide isn't just generational – it's impacted by class, geography, and indeed, confidence.

We risk creating a two-speed Ireland where digital access determines life opportunity.

4

Trust is the New Currency – And We're Running a Deficit

71% worry about data privacy while 1 in 3 actively block ads. Indeed, targeting ads create overwhelmingly negative sentiment toward both platforms (-37) and brands (-35).

The more sophisticated our targeting, the more consumers resist engagement.

5

AI's Big Challenge: Familiarity Breeds Fear

Generative AI usage doubled to 38% in one year, yet 66% fear job losses and 60% worry about indistinguishable AI content.

Deeper exposure to AI amplifies rather than calms anxiety.

In order to alleviate these fears, work will be needed to build guardrails faster than capabilities expand.

6

The Attention Economy Has Reached a Breaking Point

35% check work email on holiday, 54% check phones first and/or last thing each day, while 70% believe we've lost the art of conversation.

Most alarming, are the growing divisions in society that consumers believe social media is worsening. This is particularly concerning when focusing on women's experiences with 57% of women under 35 having witnessed or experienced online harassment.

Technology designed to connect is driving us apart.

PARTING THOUGHTS FOR ORGANISATIONS

The Trust Dividend

Ireland is saturated, dependent and ambivalent. The organisations that win the next decade will not be those with the most technology — they will be those who are trusted to wield it well. Five imperatives:

1
Lead with service

For now, hardware is done growing. Compete on the depth and quality of what runs on it.

2
Balance digital with the physical

Physical commerce is here to stay, especially when considering the divisions in digital commerce use. The winners will operate in both worlds.

3
Close the tech divide

Inclusion is strategy. Keep personal channels open and design for the unserved.

4
Bank trust

Make responsible, transparent data use a visible brand promise — not fine print.

5
Earn the AI mandate

Deploy where the public welcomes AI; disclose everywhere; keep people in the loop. Emotional human engagement will become a valuable currency.

6
Protect attention

Respect the right to switch off and be mindful of the environments your brand is promoted within. But utilize the tools and assets available for authentic engagement.

THANK YOU

Ipsos B&A

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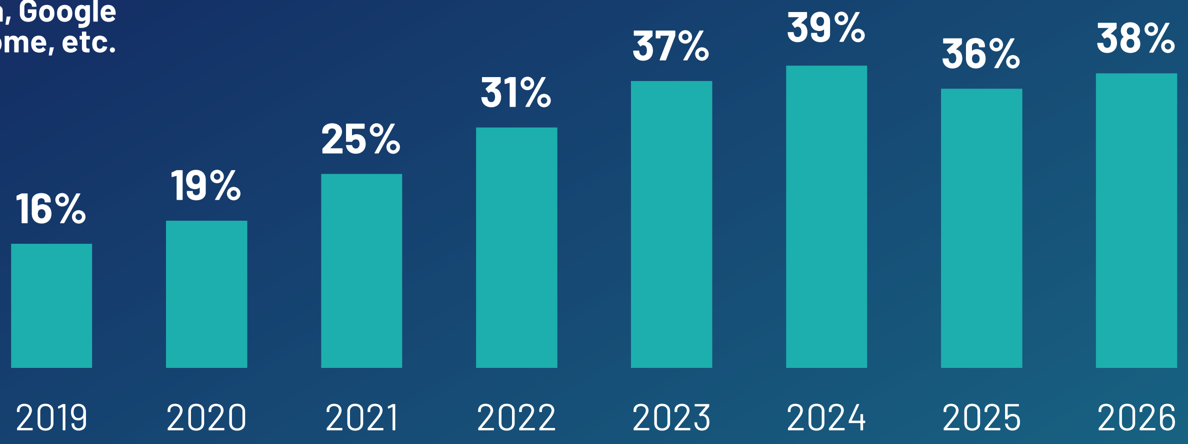
APPENDIX

The 'connected home' continues to have a role for 2 in 5, with Millennials leading the charge

38%

(36%)

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



Ownership of smart hubs peaks amongst Millennials (51%).

Generations

	2026	2025	± vs 2025
Gen Z	43%	(42%)	+1%
Millennials	51%	(46%)	+5%
Gen X	36%	(40%)	-4%
Baby Boomers	23%	(21%)	+2%
Silent Gen	3%	(0%)	+3%

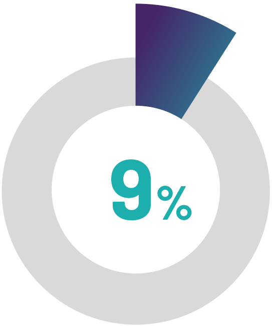
= Significantly higher = Significantly lower

() = 2025 data

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

There continues to be modest appetite for more niche and new tech

VPN/Proxy server

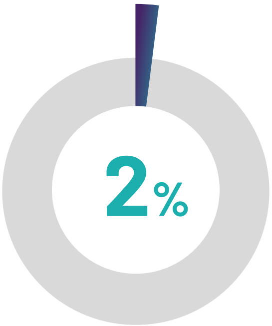


(9%)
No change since 2025

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

(12%)
No change since 2025

Meta Ray Ban display glasses



New in 2026

Older generations continue to show lower usage.

() = 2025 data

Generations

	VPN/ Proxy Server	Smart home heats Devices (e.g. Hive/Nest)	Meta Ray Ban display glasses
Gen Z	11%	13%	2%
Millennials	12%	14%	2%
Gen X	12%	14%	3%
Baby Boomers	3%	8%	1%
Silent Gen	0%	2%	2%

= Significantly higher = Significantly lower

Base: All respondents n – 1,002
Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

The number of devices seems to have reached its peak, with no movement in recent years

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.
2026 Average = 12
2025 Average = 12
2024 Average = 12
2023 Average = 12
2022 Average = 10
2021 Average = 9

Total Pop.
2026 Average = 8
2025 Average = 8
2024 Average = 9
2023 Average = 8
2022 Average = 8
2021 Average = 7

Families with pre-teens have an average of

11 SMART*

devices at home

Pre Teen Family Pop.
2026 Average = 11
2025 Average = 12
2024 Average = 12
2023 Average = 11
2022 Average = 10
2021 Average = 10

Generations
(Average No.)

	2025	2026	± vs 2025
Gen Z	11	10	(-1)
Millennials	9	9	(=)
Gen X	10	10	(=)
Baby Boomers	5	5	(=)
Silent Gen	2	1	(-1)

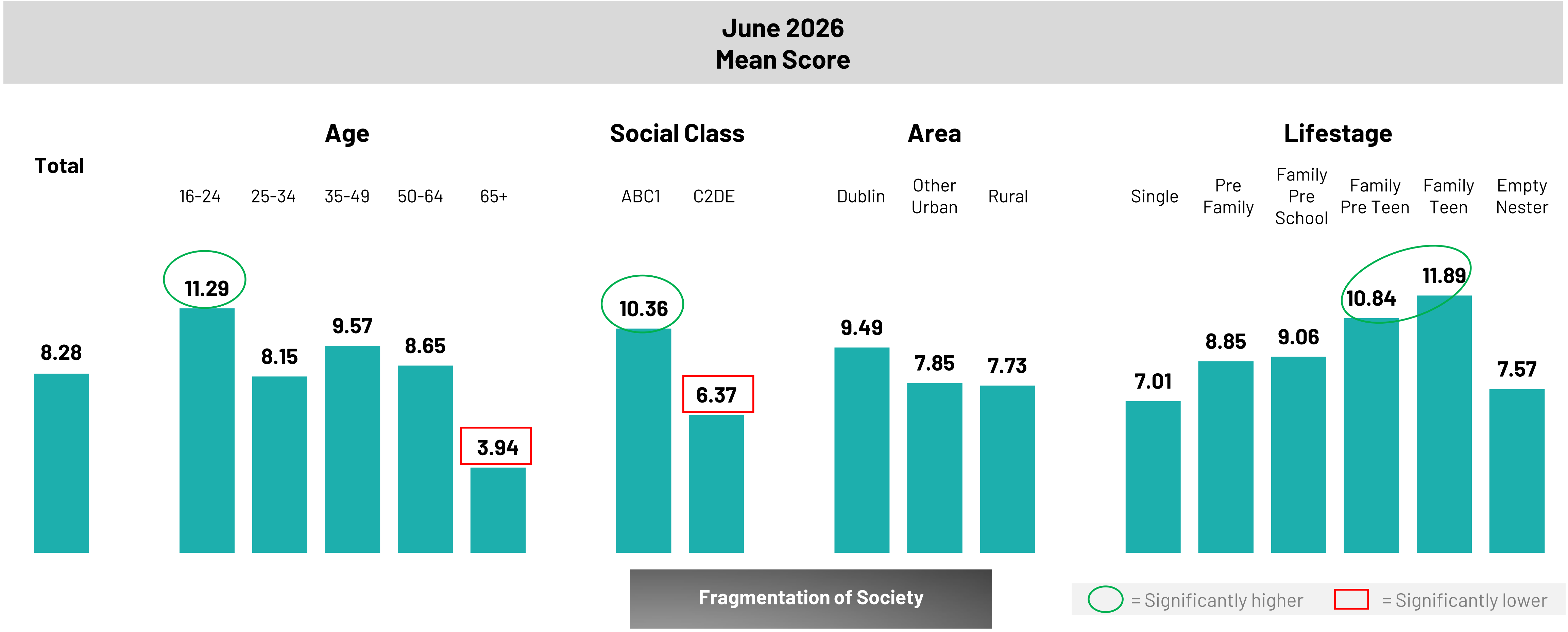
= Significantly higher = Significantly lower

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

Base: All respondents n – 1,002
Q.2 And how many ... are in the household?

The level of tech usage in the home varies significantly across demographics

Potential room for growth among older and more working class cohorts outside of Dublin.



Base: All respondents n – 1,002

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)

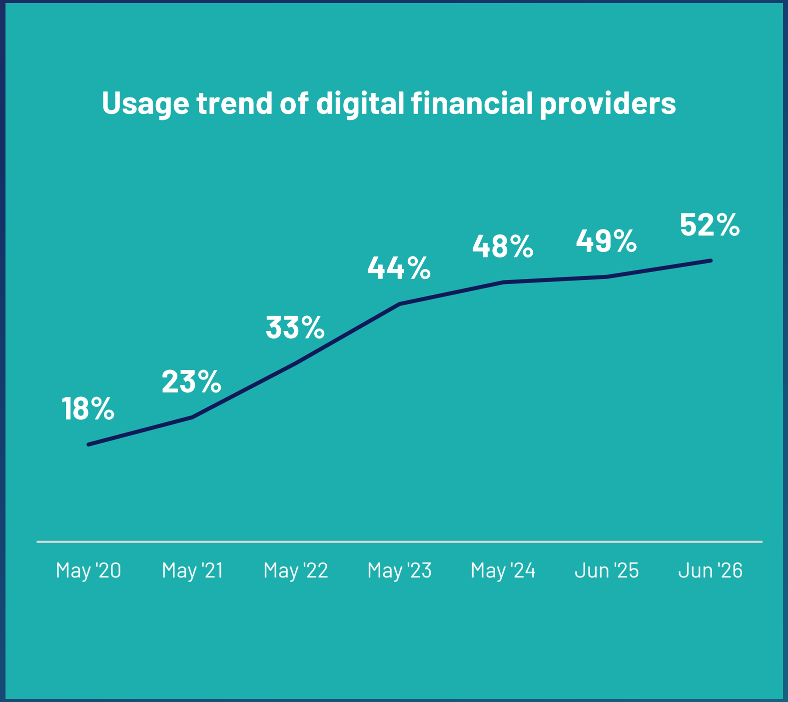
Digital financial providers have now reached half of population, demonstrating steady growth

52%

of Pop.

now use digital financial providers in Ireland

(e.g. Revolut, N26, Monzo)



Region

Dublin	Outside Dublin
65%	46%
(55%)	(46%)

Social class

ABC1	C2DE
67%	37%
(60%)	(40%)

Growth is driven by Dubliners, middle class, and either end of the generational ladder.

Generations

Gen Z	72%	(63%)
Millennials	63%	(63%)
Gen X	50%	(51%)
Baby Boomers	28%	(20%)
Silent Gen	2%	(-)

() = 2025 data

= Significantly higher = Significantly lower

Base: All respondents - 1,002
Q.3 Which of these do you do nowadays anywhere ...

Across demographics, Dubliners and middle class cohorts are driving increased usage of contactless payment

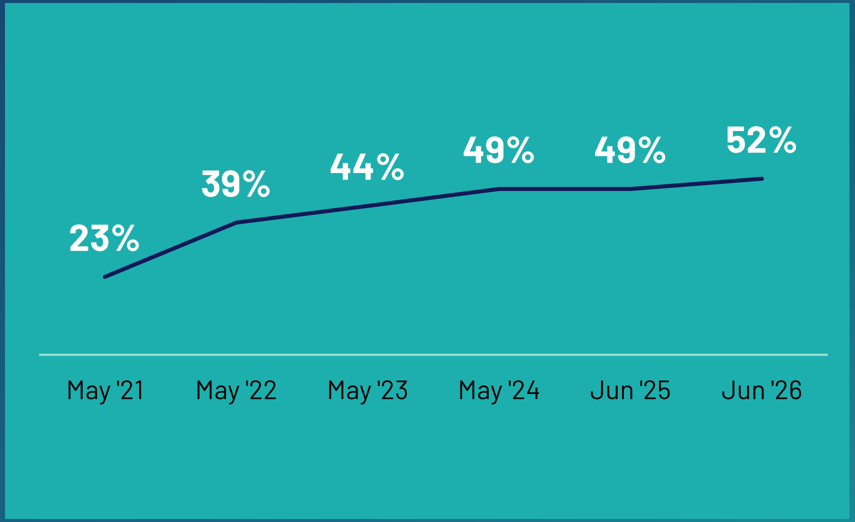
52%

(49% in 2025)

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).

Ever do nowadays

Who is ever using?		
Under 50	65%	(62%)
Over 50	34%	(29%)
ABC1	68%	(58%)
C2DE	38%	(43%)
Dublin	63%	(52%)
Outside Dublin	47%	(47%)



() = 2025 data

Base: All respondents - 1,002
Q.3 Which of these do you do nowadays anywhere ...

5%

(5% in 2025)

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

Cryptocurrency hasn't seen any real momentum in 2026

Who is dabbling more than others

Males under 50	10%
ABC1	9%
Any AI usage	11%

Emerging tech users are more likely to put their faith in other tech driven products

Base: All respondents - 1,002
Q.3 Which of these do you do nowadays anywhere ...

Ipsos B&A

Streaming platforms are not gaining ground in 2026, while utility uses continue to grow (online banking, personal email, & video conferencing)

*Those with both Netflix & Amazon Prime = 68% (so Netflix is dominant with Amazon seen as an add on)

70%
ANY Paid Streaming

Entertainment

74% (76%)
Watch or listen to content on YouTube

****66%** (64%)
Subscribe to Netflix

51% (52%)
Stream music, via Spotify, YouTube, etc

49% (45%)
Listen to Podcasts

42% (46%)
Use catch-up TV services like RTE Player, TV3 Player, All4, Virgin and Sky On Demand etc on mobile/laptop/TV or other devices

33% (33%)
Subscribe to Amazon Prime

31% (30%)
Watch or stream live sports or other events online

30% (28%)
Subscribe to Disney+

17% (17%)
Play Games online with others

15% (19%)
*Watch an online streaming service such as Twitch, YouTube Gaming

10% (10%)
Subscribe to AppleTV

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

8% (10%)
Subscribe to Paramount+

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

Communications

86% (83%)
Use personal email

78% (77%)
Use instant messaging and calling services - WhatsApp, Facebook Messenger, Snapchat, Viber, Discord, Skype etc.)

76% (74%)
Online banking (e.g. your banking website app or login to their website)

52% (49%)
Digital financial products/banks such as Revolut, N26, Monzo

47% (42%)
Use video calling/conferencing (e.g. Zoom, Microsoft Teams, Facetime, etc.)

35% (34%)
Use cloud applications (e.g. WeTransfer, One Drive, Dropbox, iCloud, Google Drive, Evernote etc.)

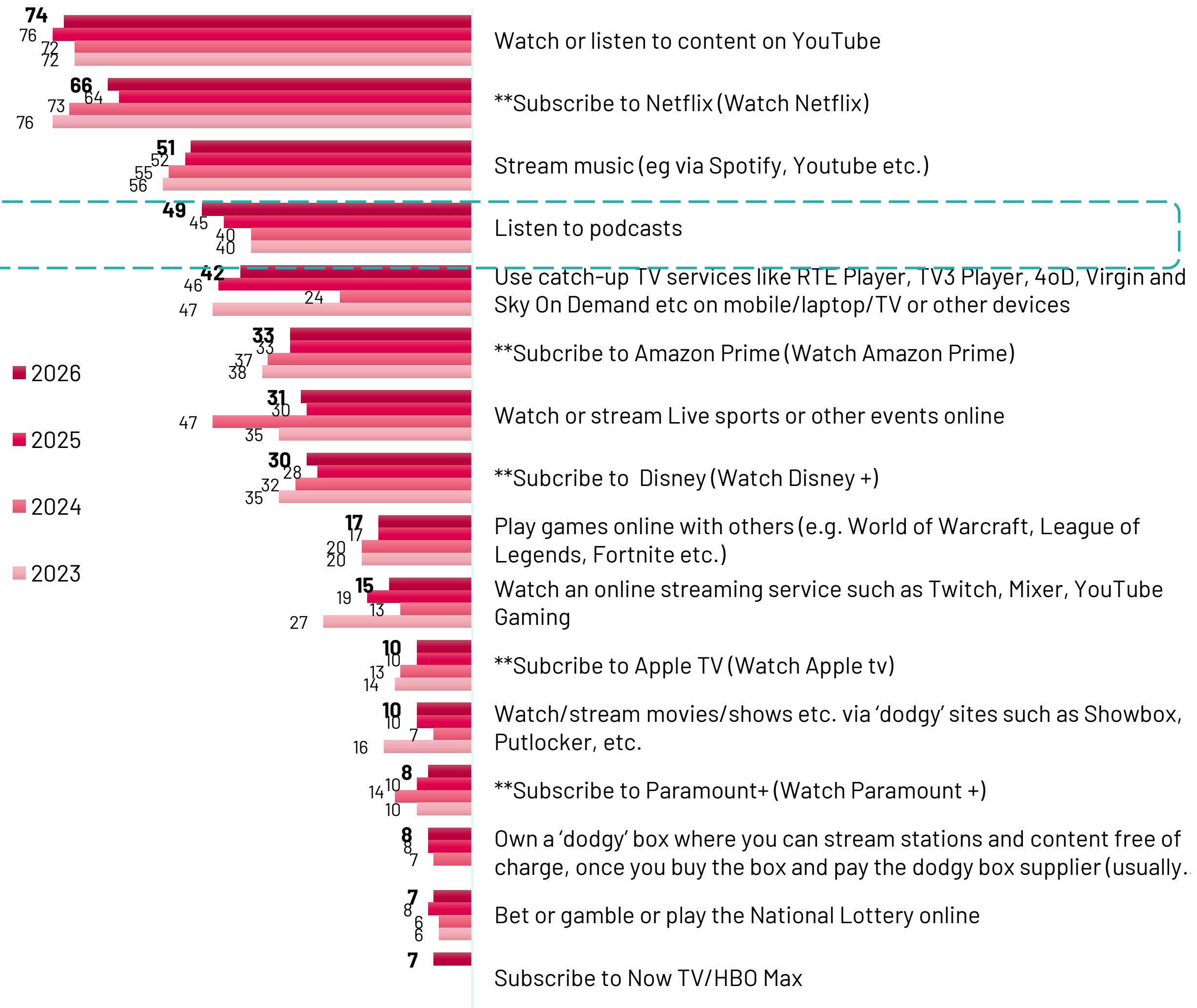
Base: All respondents- 1,002

Q.3 Which of these do you do nowadays anywhere ...

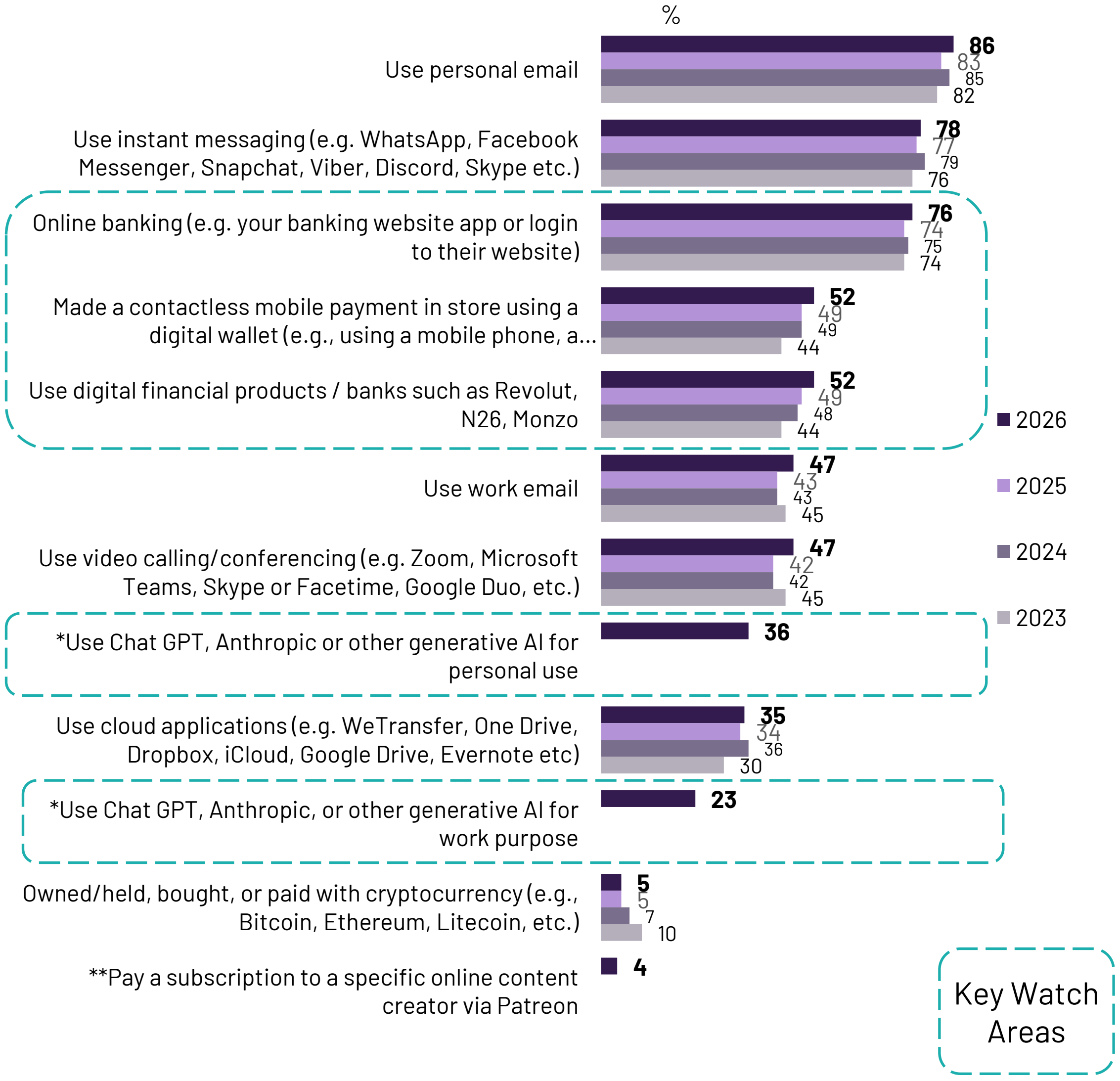
*Wording change in 2026
** = statement wording changed 2025
( ) = 2025 data

Online services we are using nowadays - Trended

Entertainment



Communications



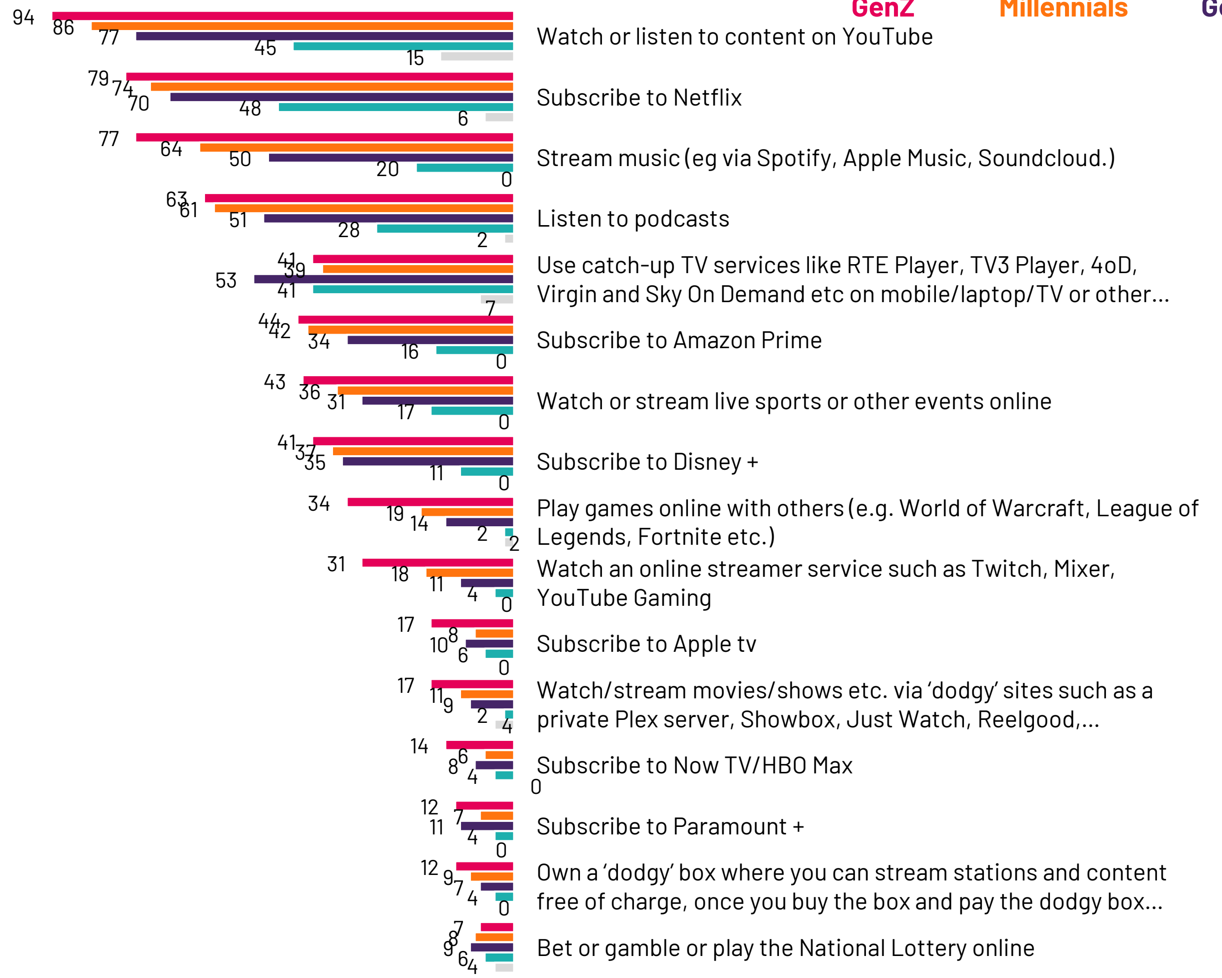
Base: All respondents - 1,002
Q.3 Which of these do you do nowadays anywhere …

Dodgy box added 2024
** = statement changed 2025

* Chat GPT now two codes Personal/Business changed 2026 single code 2025 = 22%
**new statement added 2026

Online services we are using nowadays x Generations

Gen Z and Millennials greatly favouring the majority of streaming services, while there is less of a lean toward Gen Z in regard to utility services (e.g. work email, online banking, and so. Gen Z's are much more likely to adopt digital financial products however.



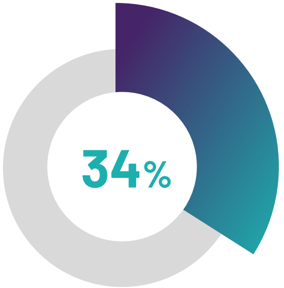
Base: All respondents - 1002
Q.3 Which of these do you do nowadays anywhere …

** = statement changed 2025

Irish consumers show modest appetite for paid versions of online services

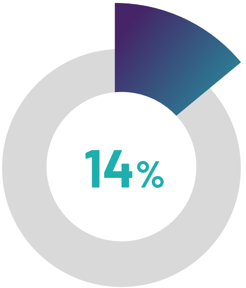
Music streaming shows a stronger conversion to paid subscribers. Gen Z primarily drive this and higher rates of paid engagement across other subscriptions also.

Subscribe to Music Streaming (e.g. Spotify, Apple Music, etc)



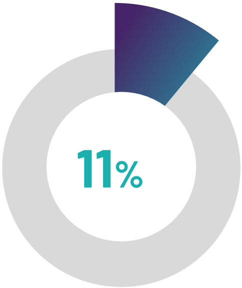
GenZ	46%
Millennials	37%
Gen X	30%
Baby Boomers	17%
Silent Gen	-

Subscribe to YouTube



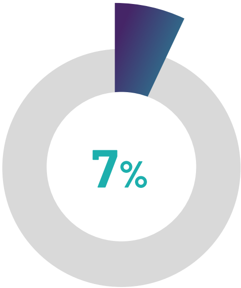
GenZ	17%
Millennials	17%
Gen X	11%
Baby Boomers	9%
Silent Gen	9%

Subscribe to Generative AI (e.g. ChatGPT, etc)



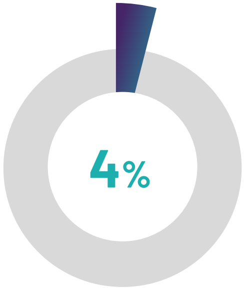
GenZ	15%
Millennials	18%
Gen X	8%
Baby Boomers	3%
Silent Gen	-

Subscribe to games online (e.g. World of Warcraft, etc)



GenZ	12%
Millennials	6%
Gen X	6%
Baby Boomers	-
Silent Gen	-

Pay a subscription to a specific online content creator via Patreon



GenZ	7%
Millennials	4%
Gen X	3%
Baby Boomers	2%
Silent Gen	-

New statements added 2026

Base: Those using streaming and online services at Q3 n – 828
Q3a Do you pay a subscription for any of the following?

Prioritisation of online entertainment is more middle-class and Dublin centric

	Total Pop.	Social class: ABC1	Social class: C2DE	Region: Dublin	Region: Other urban	Region: Rural
Broadband is more important to me than TV	56%	**67%**	**48%**	**66%**	56%	**49%**
I no longer see the value in paying for live TV plans (e.g. Virgin, Sky) as I can access all content through streaming services	46%	49%	44%	**53%**	47%	**38%**
I am watching more content on YouTube than on live TV	41%	45%	39%	47%	38%	**38%**

Significantly higher | Significantly lower

Base: All Adults 16+ - 1,002

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

SOCIAL MEDIA USAGE

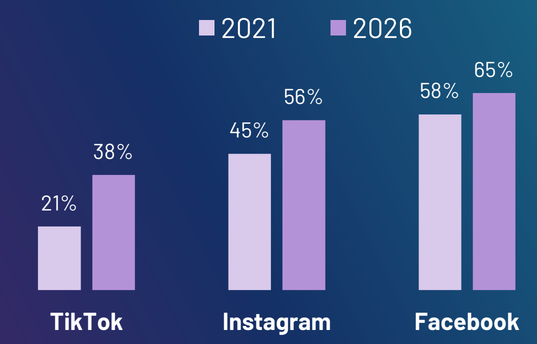
WIDELY USED, BUT THERE ARE SIGNS THIS IS LEVELLING OUT

Growth in social media is slowing, albeit at a high level Facebook and Instagram particularly

Albeit TikTok shows continued levels of momentum (+17%)

	June 2026	Change vs June 2025 %	Change vs 2021 %
Facebook	65%	-2	+7
Instagram	56%	+1	+11
Facebook Messenger	52%	-4	-
TikTok	38%	+4	+17
Snapchat	30%	+1	-1
LinkedIn	27%	=	+6
X (formerly known as Twitter)	20%	+1	-2
Pinterest	17%	+1	+5
Reddit	11%	+1	+4
Telegram	9%	+1	n/a
Threads	9%	n/a	n/a
Dating apps / sites (e.g Hinge, Bumble, Tinder, etc)	6%	n/a	n/a
Twitch	4%	=	+4
Signal	3%	+1	+1
Be Real	2%	=	n/a
Truth Social	2%	n/a	n/a
BlueSky	2%	=	n/a
None of these	15%		-

The big movers in the last five years are Tik Tok (+17), Instagram (+11), and Facebook (+7).

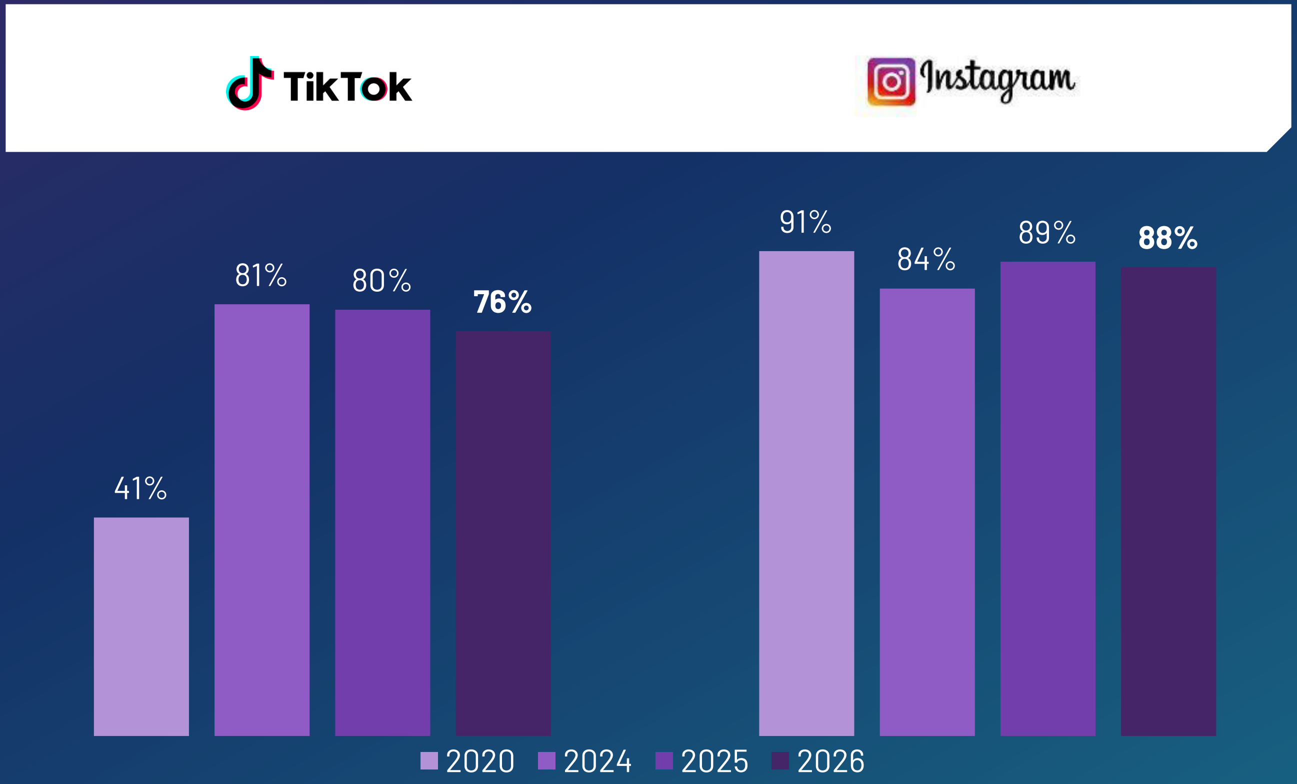


= Significantly higher = Significantly lower

Base: All Adults 16+ - 1,002

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

We are also seeing 16-24 year olds (those most engaged with social media) pulling back on their social media use, albeit their most cited platforms remain on top



Other platforms show more significant declines among this active age cohort:

LinkedIn (-16%): 40% to 24%

Facebook (-14%): 71% to 57%

Facebook Messenger (-13%): 65% to 52%

Reddit (-5%): 25% to 20%

Base: All 16-24 yrs - 124

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

Seeing clear retraction across social media services among this under 25 age cohort, with the exception of Pinterest and Telegram.

	June 2025	June 2026	Change vs 2025
	%		%
Instagram	89	88%	-1
TikTok	80	76%	-4
Snapchat	78	75%	-3
Facebook	71	57%	-14
Facebook Messenger	65	52%	-13
Pinterest	27	35%	+8
X (formerly known as Twitter)	30	32%	+2
LinkedIn	40	24%	-16
Threads	n/a	23%	n/a
Telegram	16	21%	+5
Reddit	25	20%	-5
Dating apps / sites (e.g Hinge, Bumble,...	n/a	14%	n/a
Twitch	15	12%	-3
Be Real	11	7%	-4
Signal	3	7%	+4
Truth Social	n/a	3%	n/a
BlueSky	3	3%	=

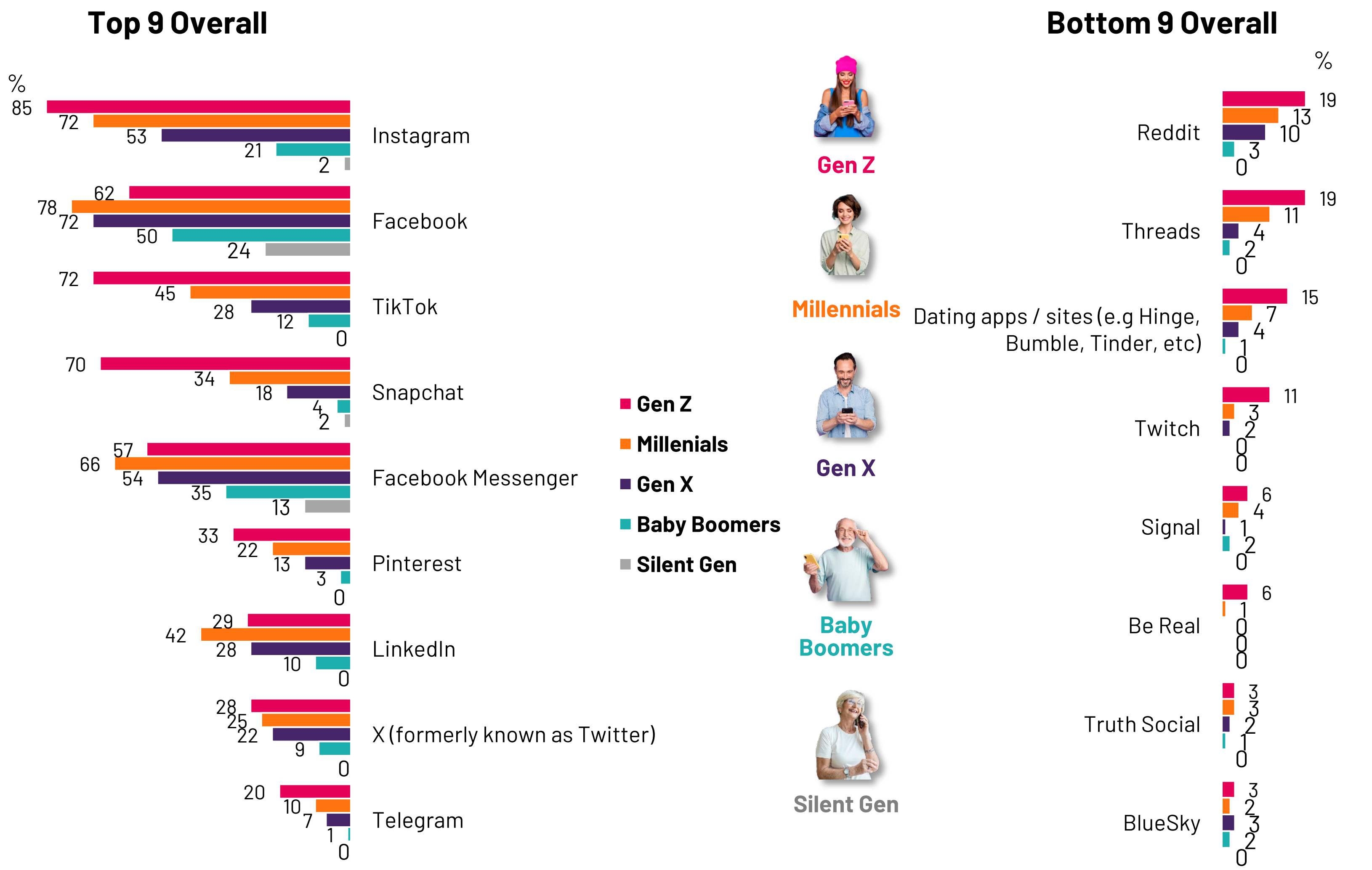
Base: All 16-24 yrs - 124

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

Telegraph + Bluesky added 2025
Dating apps/sites, Threads + Truth Social added 2026

Younger generations are most engaged overall

Facebook has the widest reach across all generations; TikTok, Snapchat, and a number of other niche platforms are dominated by Gen Z.

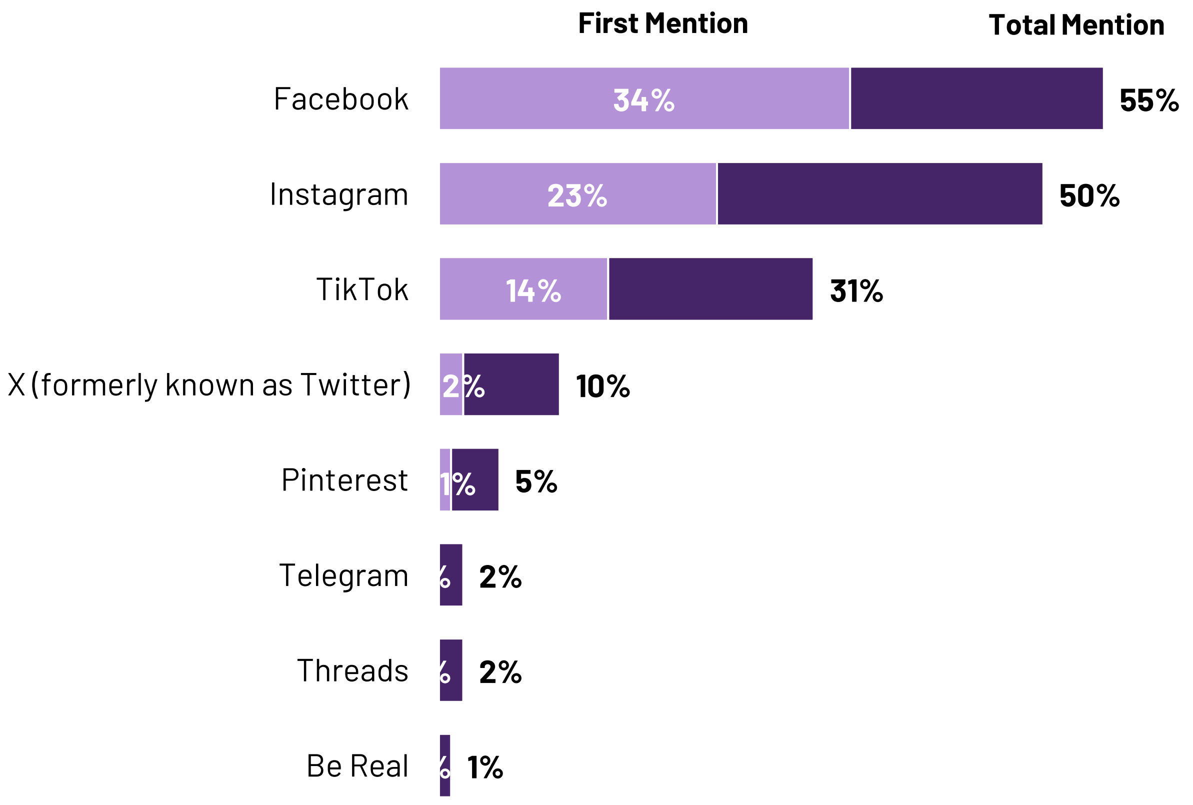


Base: All adults 16+ - 1,002

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

Facebook and Instagram show highest volume of usage

Facebook is more widely used across generations, with Instagram only topping usage among Gen Z



Generations

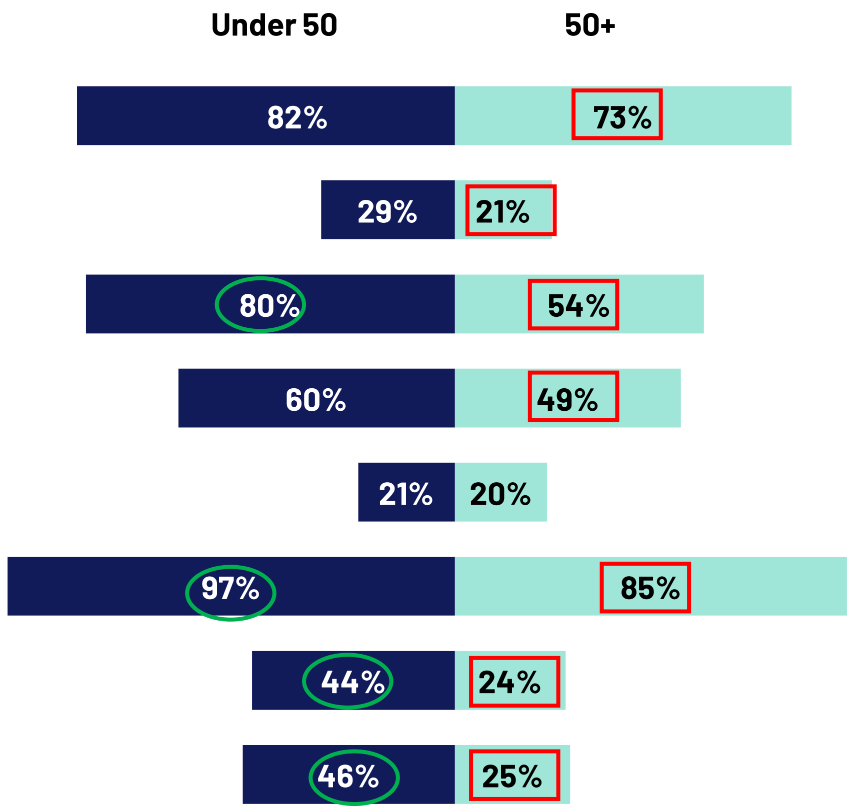
	Top Used App	
Gen Z	Instagram	78%
Millennials	Facebook	67%
Gen X	Facebook	63%
Baby Boomers	Facebook	44%
Silent Gen	Facebook	18%

Base: All adults 16+ - 1002

Q.5a And which of the following social media sites did you spend the most time on yesterday? RANK 1,2,3 in order of the most time you feel you spend on them yesterday.

= Significantly higher = Significantly lower

Baby Boomers & Silent Gen display much lower take up across the board



	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
	%	%	%	%	%
Any Smart TV	82	82	84	73	37
Desktop	27	31	31	16	6
Laptops	83	79	73	50	12
Tablets	57	61	69	40	21
eReaders	22	20	25	19	2
Smart phone	97	97	97	85	31
Wearable devices	43	47	37	18	2
Smart speaker	43	51	36	23	3

Clear divide between generations: number of smart devices in house

- **Gen Z 10 devices**
- **Millennials 9 devices**
- **Gen X 10 devices**
- Baby Boomers 5 devices
- Silent Gen 1 devices

= Significantly higher

= Significantly lower

Base: All respondents – 1,002

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

Only 24%

of those over 65 years old are confident they can keep up with new technology

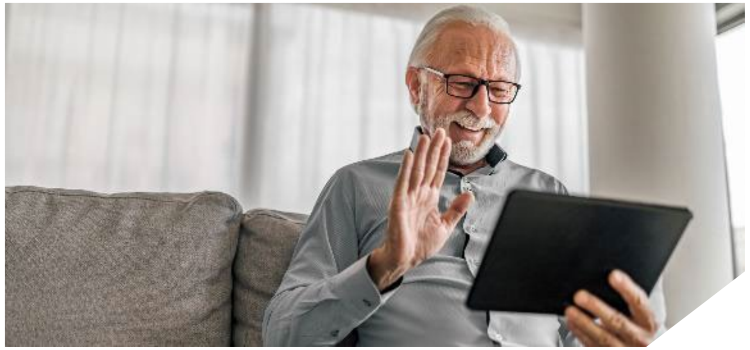
This is a key watch out area – we cannot leave older generations behind

Daily internet access continues to edge up, with 3 in 5 of those over 65 citing daily usage

Increase in YOY daily internet usage as

89%

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



59%

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

Generations

	2026	± vs 2025
Gen Z	98%	+1
Millennials	99%	=
Gen X	95%	+5%
Baby Boomers	71%	+4%
Silent Gen	22%	-11%

= Significantly higher = Significantly lower

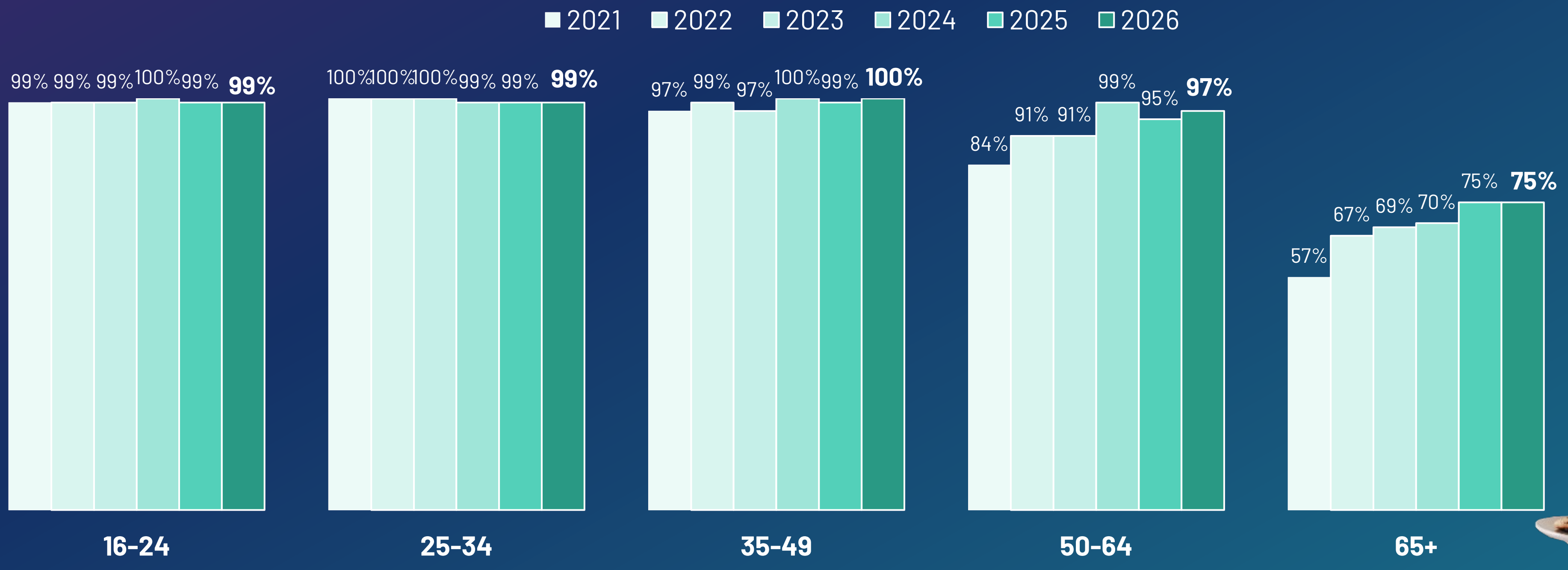
But not everybody is on board…

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

Base: All respondents – 1,002
Q.4 How often do you yourself access the internet nowadays?

( ) = 2025 data

Universal usage is seen among those under 65; we must be cognisant of the quarter of +65s that are not engaging



3 in 4

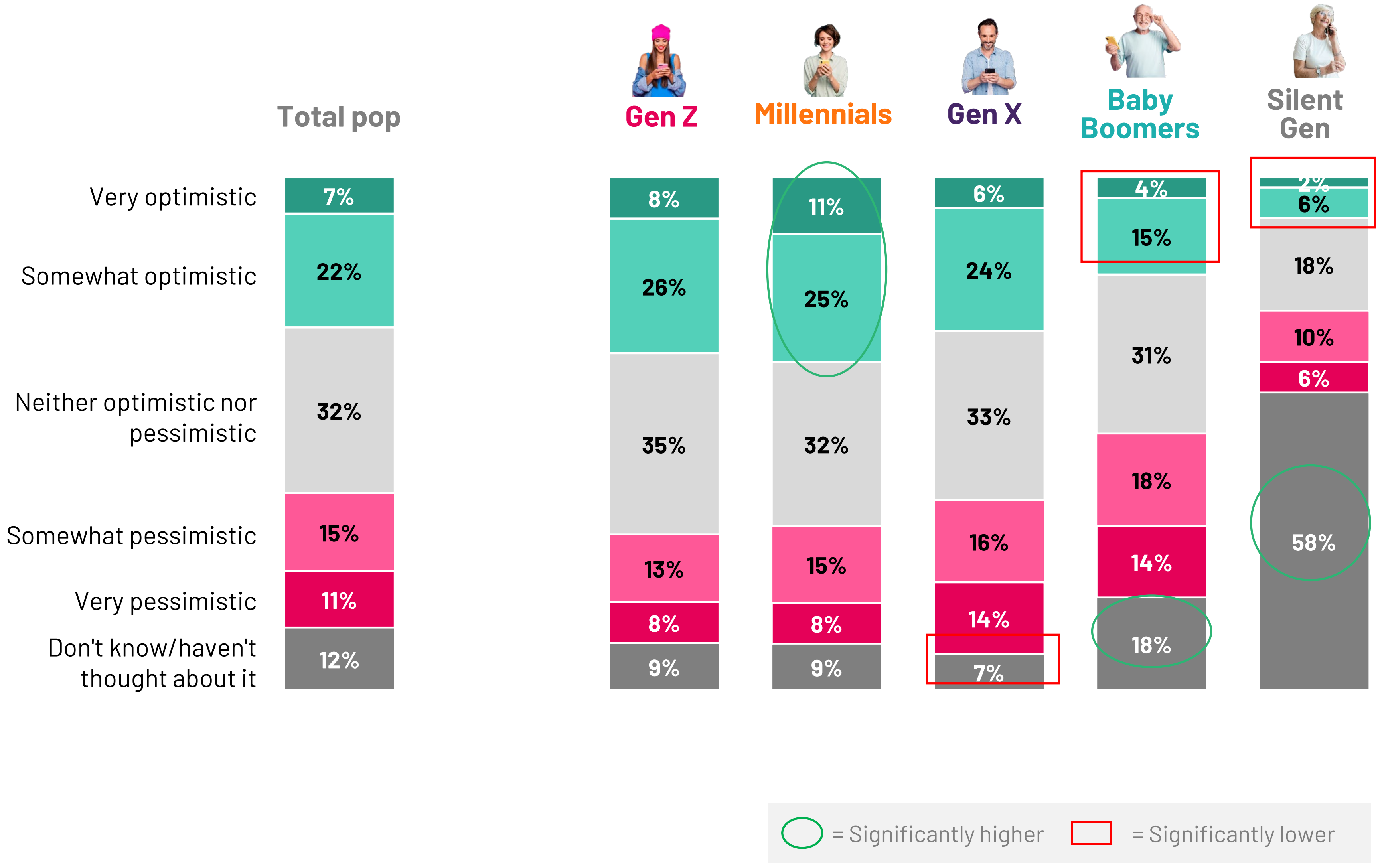
over 65's are using the internet to some extent

Base: All respondents n – 1,002

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

We are on the fence when it comes to the role of AI and technology in the future

Generational division is clear, with older generations viewing it with much less optimism.

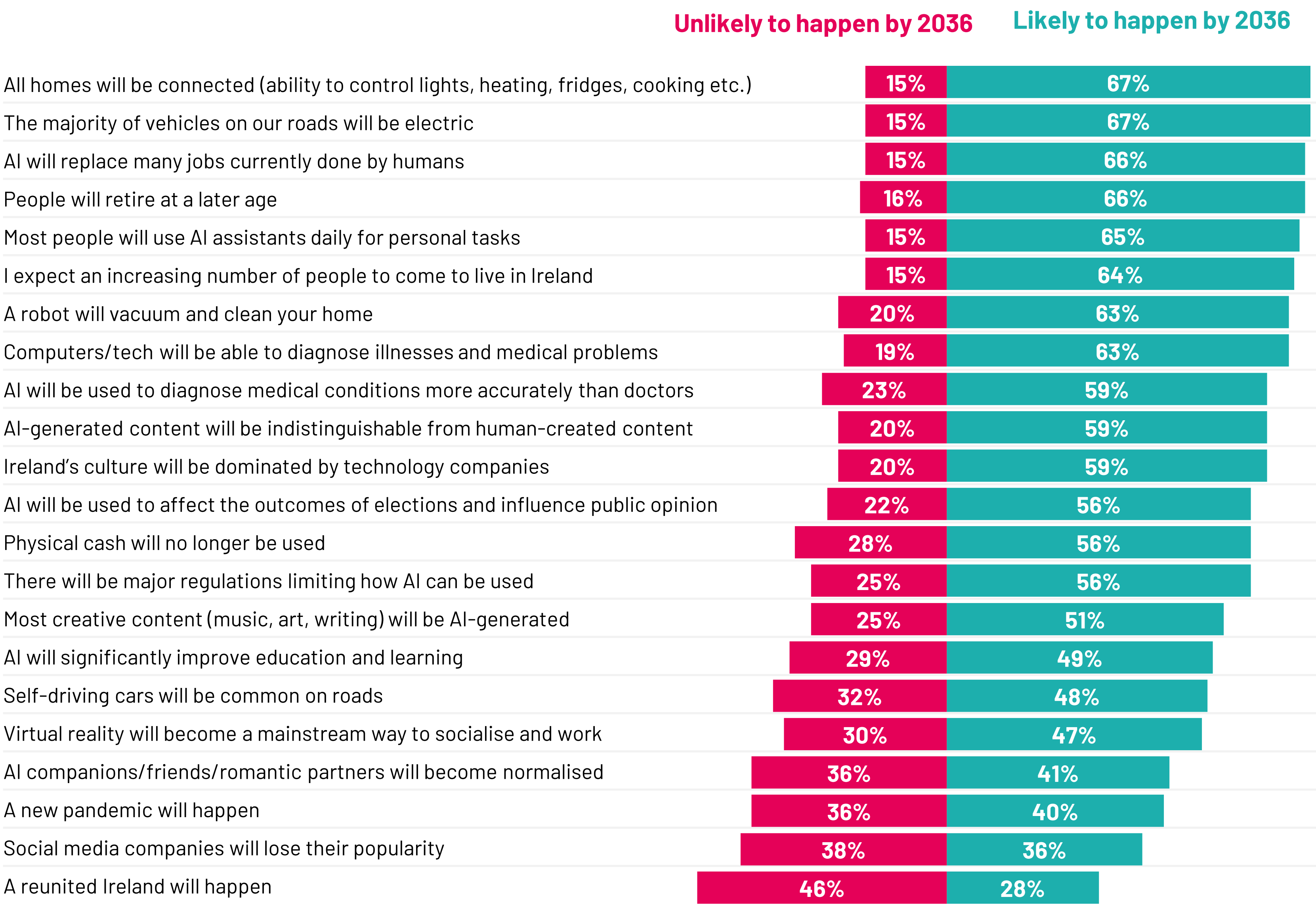


Base: All respondents - 1,002

Q.19 When you think about the next 10 years how do you feel about the role technology and AI will play in society?

There is strong belief that many of the future scenarios are likely to happen

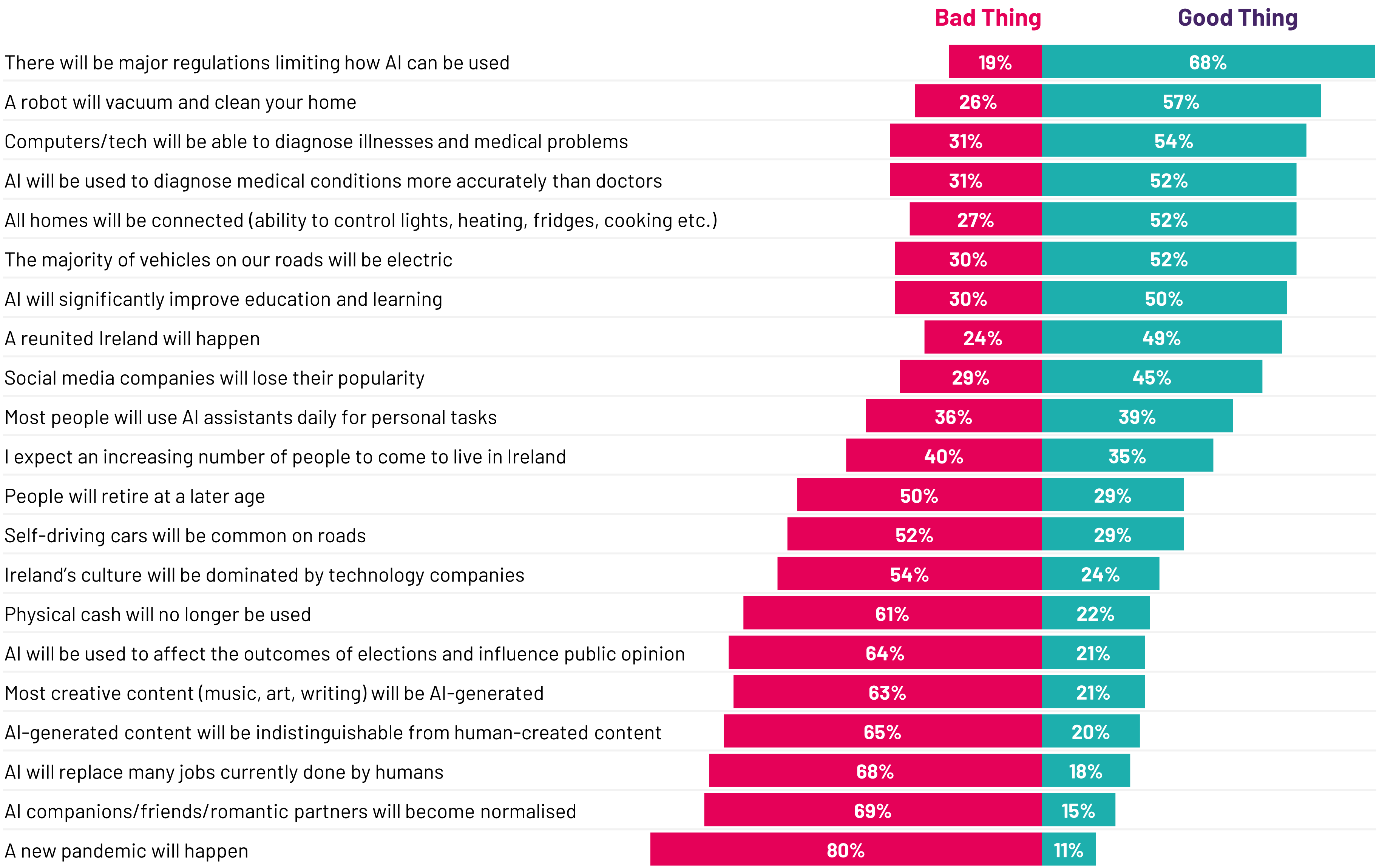
With the exception of a united Ireland and social media companies losing their popularity, all other scenarios are seen as more likely to happen than not. Technology assisting in household activities, driving, and daily tasks are seen as very likely, as well as job losses due to AI.



Base: All adults 16+ - 1,002
Q20 Thinking about the next 10 years, to what extent do you think each of the following will happen by the year 2036?

AI regulation, as well as AI household and medical assistance are all viewed in a positive light

The potential downsides of AI (job losses, difficulty identifying AI content, and AI companions) are all viewed most negatively.



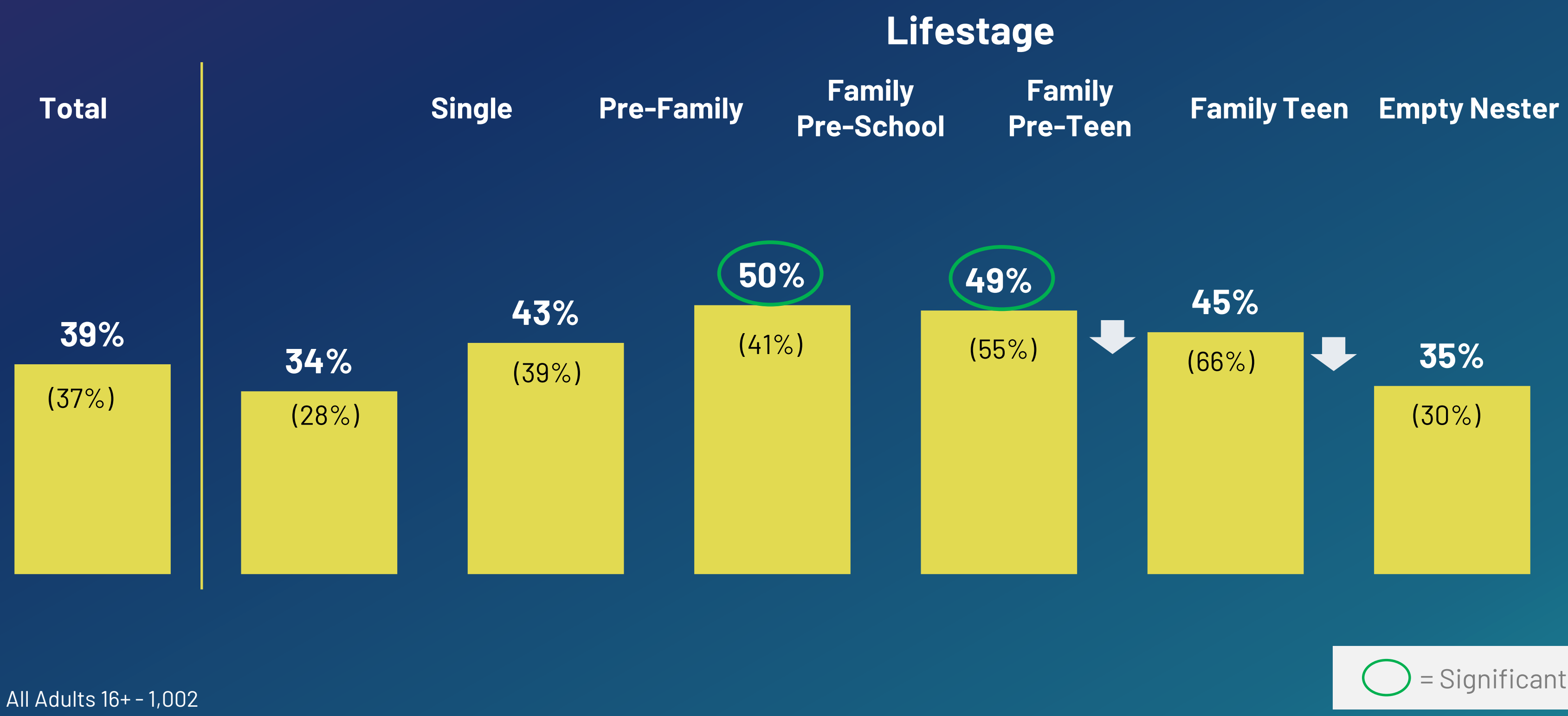
Base: All adults 16+ - 1,002

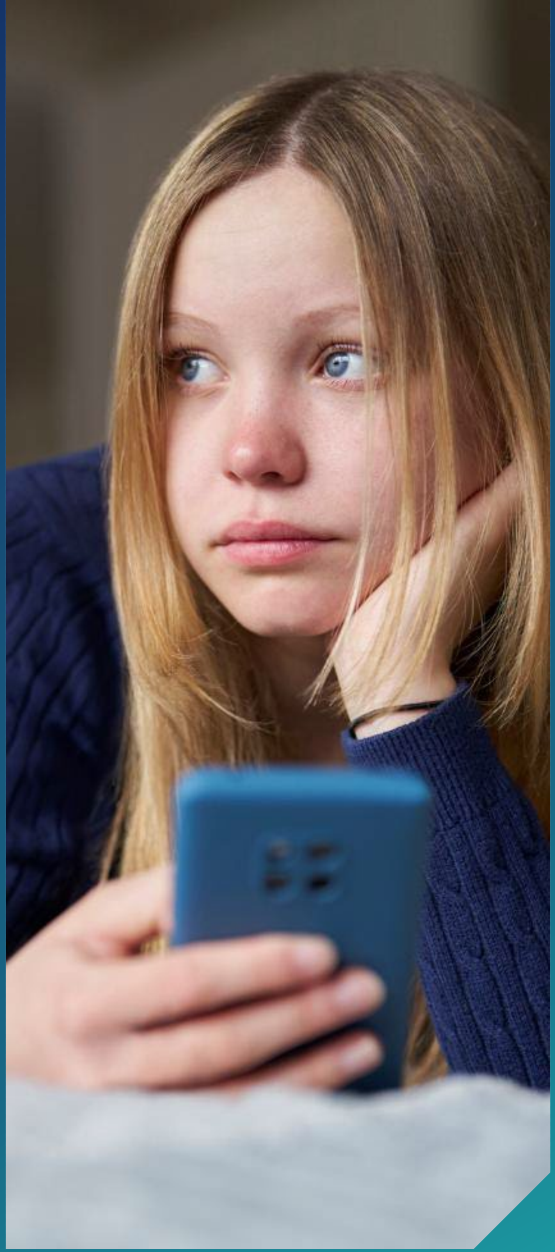
Q.21 If each of the latter elements happened to occur, to what extent do you think it would be a good or bad thing? SHOW CARD

A significant minority cite the negative impacts of technology in their home

Notably, there has been a shift in perspective; there are decreased numbers of family pre-teen and teen life stages noting the impact of technology, while single, pre-family, pre-school, and empty nester life stages all show increased mentions.

"Technology is having a negative impact on family life in my home"





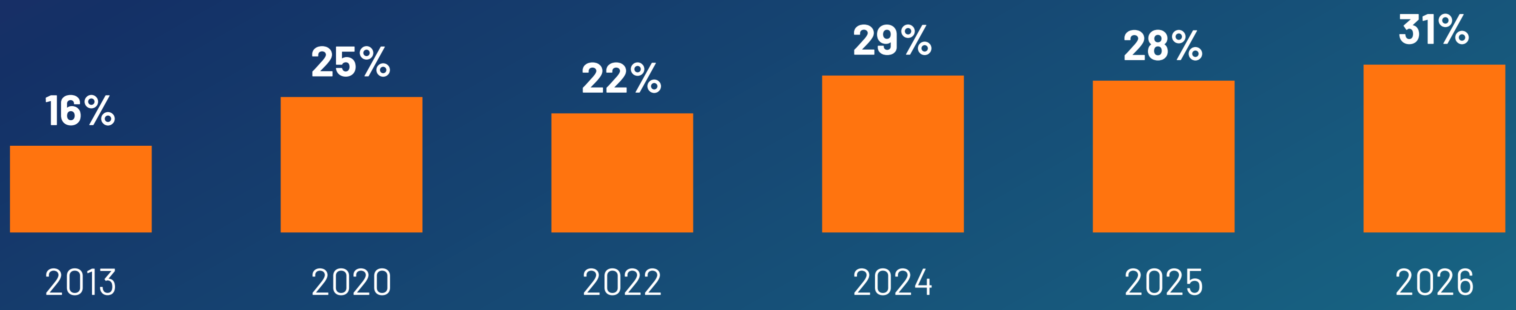
Base: All Adults 16+ - 1,002

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.)

3 in 10

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

Our post-covid world has seen a sharp incline in difficulty disconnecting, likely due to the return to the "real world" paired with the newfound ability to work from anywhere for many.



Age

	2020	2022	2024	2025	2026
	%	%	%	%	%
16-24	39	39	32	44	**42**
25-34	34	33	48	41	**43**
35-49	26	21	34	34	**39** ↑
50-64	18	14	25	17	**24** ↑
65+	9	10	8	11	**10**

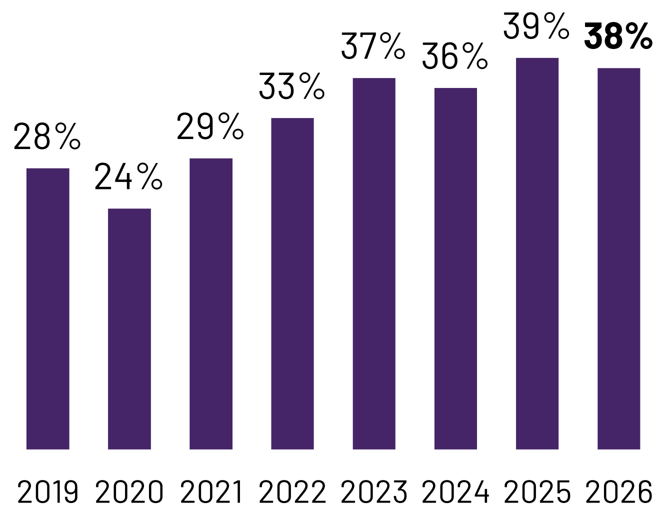
Increasing inability to disconnect is driven by those aged 35 – 64, with multiple competing priorities likely playing a factor.

Base: All Respondents n – 1,002
Q14 To what extent do you agree with each of the following?

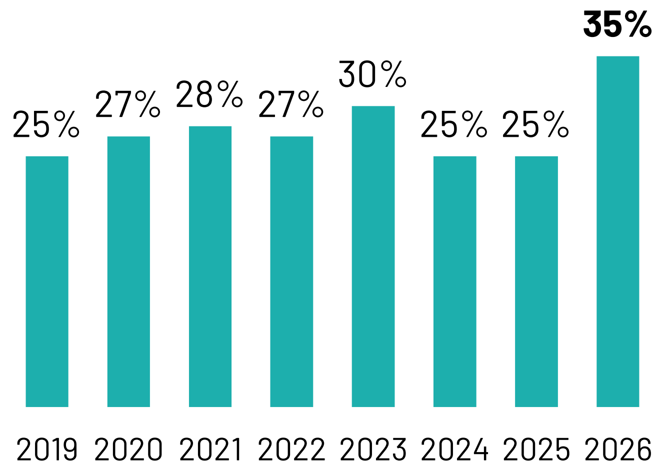
While we are getting slightly better at not checking our phones when trying to sleep, disconnecting from work is becoming harder

We see a significant increase in checking work emails while on holiday, showing a deteriorating ability to disconnect. Millennials are more susceptible to both checking their phone at night and their work emails while OOO – a wired in generation.

Check social media or emails when having difficulty sleeping

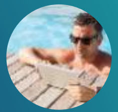


Check work emails when on holidays



(48% amongst ABC1)

Generations

	Check social media or emails when having difficulty sleeping	Check work emails when on holidays
Gen Z	60%	41%
Millennials	48%	50%
Gen X	33%	41%
Baby Boomers	13%	12%
Silent Gen	3%	-

Base: All Adults 16+ - 1,002
Q.8 Which, if any of the following do you do nowadays? ...

= Significantly higher = Significantly lower

56%

Agree that technological development poses a considerable threat to mankind

Generations

Gen Z	53%
Millennials	58%
Gen X	61%
Baby Boomers	55%
Silent Gen	44%

A cross generational understanding & concern around the risks are clear

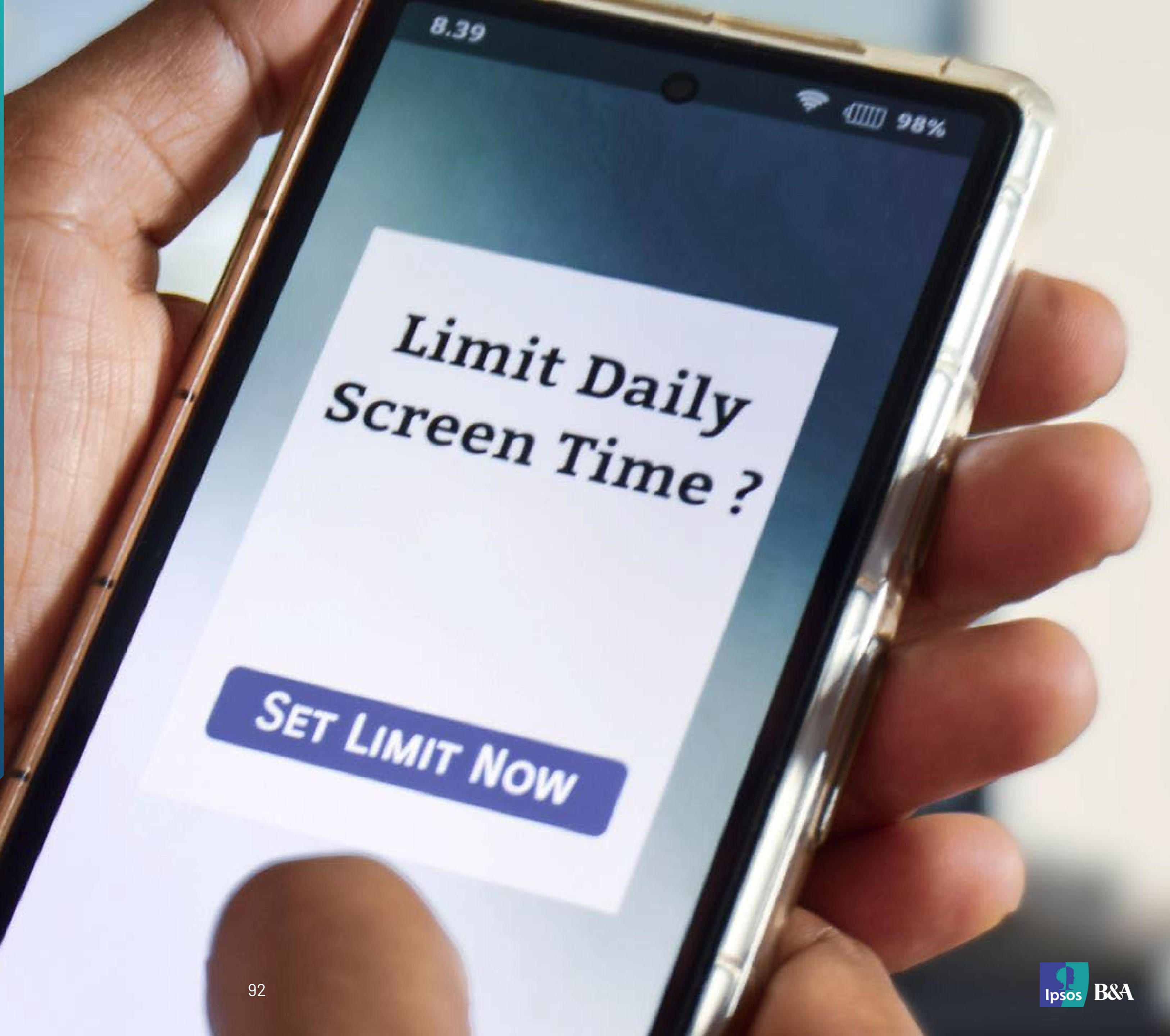
= Significantly higher = Significantly lower

Base: All Respondents n – 1,002
Q.13 To what extent do you agree or disagree …Technological development poses a considerable threat to mankind

13%

Use a screen time limiter on their phone

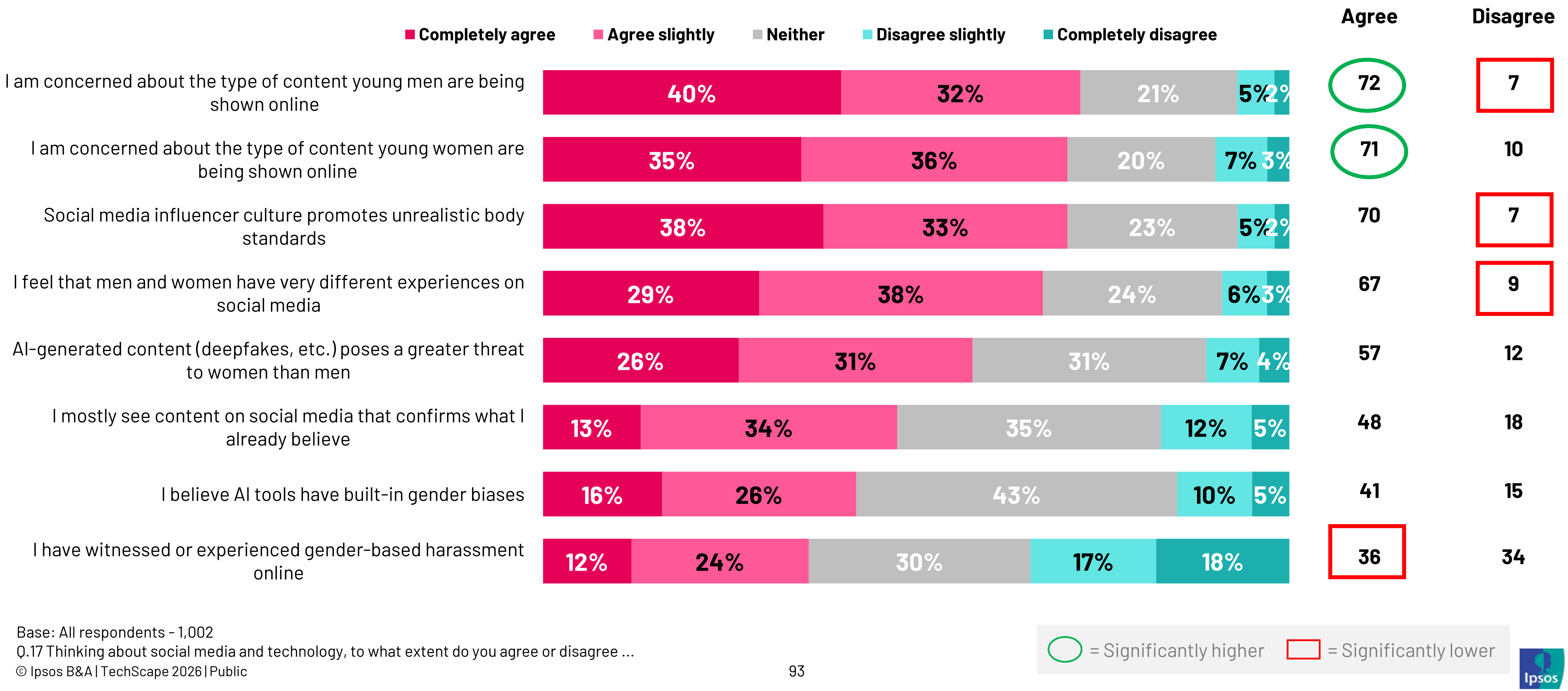
Though this shows limited usage, it **doubles among Gen Z (26%)**, showing the awareness of time spent online among this highly online group.



Base: All with a smartphone n – 925
Q.6a Do you use a screen time limiter on your phone?

There are clear concerns around social media and its impact on body image and gender division

There are serious concerns about what both young men and women are exposed to online with 7 in 10 concerned, as well as a strong belief that social media promotes unrealistic body standards.



Base: All respondents - 1,002
Q.17 Thinking about social media and technology, to what extent do you agree or disagree …