IPSOS B&A TECHSCAPE 2024

June 2024

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Prepared by:

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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 May 2024.

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 32-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday, April 19 and Friday, May 3, 2024. For this survey, Ipsos interviewed a total of 23,685 adults aged 18 years and older in India, 18-74 in Canada, Republic of Ireland, Israel, 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 1,000 individuals each in Australia, Brazil, Canada, mainland China, France, Germany, Great Britain, Italy, Japan, New Zealand, Spain, and the U.S., and 500 individuals each in Argentina, Belgium, 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, New Zealand, 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, China, Colombia, Indonesia, Ireland, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand, and Turkey 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 32-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 – 27

21%

866,000

Millennials

Born 1980-1995

Age 28 - 44

28%

1,155,000

Gen X

Born 1966-1979

Age 45-58

22%

911,000

Baby Boomers

Born 1945-1965

Age 59-79

25%

1,027,000

Silent Gen

Born 1944+

Age ≤80

4%

165,000

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 THEMES

Preface

Ireland's enduring fascination with technology is hardly a surprise, given the prominent presence of tech giants like Meta, Google, Microsoft, and TikTok. These companies are drawn to Ireland's unique position as the last English-speaking EU member.

The 2024 Ipsos B&A TechScape report provides a comprehensive picture of the Irish population's relationship with technology. The report primarily uses face-to-face research to gauge overall trends, delving deeper into AI trends online.

While the number of devices per household is increasing, albeit at a slower pace among younger generations, internet usage is expanding in the 65+ age group. However, a digital divide persists, with middle-class cohorts having greater access to technology than their blue-collar counterparts. This disparity is mirrored in the working-from-home trend, primarily a middle-class, Dublin-centric phenomenon. Similar to the challenges faced in promoting sustainability and addressing climate change, which are often perceived as middle-class issues, we must be mindful of those with limited access to technology. This access is crucial for education, essential services, and overall participation in the modern workforce.

The Irish population is rapidly embracing new financial technologies, particularly younger generations. Similarly, how we consume content is evolving, with streaming and podcasts gaining significant traction. However, traditional media like television and radio remain relevant, demonstrating a fragmented media landscape, especially among younger demographics, making them more challenging to target and understand. This fragmented landscape is driven by the evolving ways people interact and their changing needs. For example, people, especially Gen Z, are increasingly avoiding 'company speak' and seeking an unvarnished reality. This has led to the rise of platforms like TikTok, which caters to this desire for virtual authenticity.

Within this context, the Irish perspective on AI's role in the future is intriguing. Compared to the global sentiment, Ireland exhibits more apprehension and less trust, particularly regarding data security and the potential impact on future employment. There's a notable level of concern about AI's implications, with fears surrounding its potential to hinder student learning in educational institutions. Regulation emerges as a recurring theme in discussions about AI in Ireland. Given the country's technology-driven landscape, this keen interest in AI developments is unsurprising. However, it's essential to maintain a balanced perspective on AI beyond the media hype, considering that only 16% of the population currently utilizes tools like ChatGPT, primarily driven by specific demographics such as middle-class Dubliners, Gen Z, and Millennials.

The key takeaway from the report emphasizes the need to move beyond surface-level statistics and develop a deeper understanding of people's relationships with technology. This includes how they interact with and consume technology, and its impact on their consumption of products and services. The report underscores the importance of going beyond simply presenting numbers and extracting valuable insights for government entities, organizations, and citizens alike. In essence, it advocates for a more profound understanding: "Be Sure, by Delving Deeper."

Luke Reaper, CEO (Ireland) Ipsos B&A

Key Themes

1. Increasingly Connected Irish Consumer

- 'Better' smart TVs, wearables, e-readers, and connected homes.
- 9 connected devices on average (12 for teen family households)
- Middle class skew.

2. Older cohorts more digitally active

- 54% of 65+ year old online daily.
- But less into gadgets.

3. Phenomenal Streaming Growth since 2020

- 73% watch Netflix .
- 40% listen to Podcasts 37% watch Amazon Prime.
- 7% own a 'Dodgy box'.

4. BB more important than TV for half the population (53%)

- Indicates streaming growth, but also the important role that TV still has.
- Platforms such as YouTube are players, with 56% GenZ watching more content on YouTube than on live TV.

5. Digital Financial Revolution

- Half (48%) now use digital finance providers (e.g. Revolut, N26, Monzo etc.)
- 49% use contactless payments

6. Desire for Virtual Authenticity

- Growth in TikTok (35%), WhatsApp (85%), Instagram (51%).
- A desire for unvarnished reality, as people avoid 'company speak'.

7. High AI nervousness in Ireland

- 67% nervous about products and services that use AI, compared to 40% who say AI makes them excited. Globally Ireland has the highest level of nervousness of products and services using AI (67% Ireland, 50% global)

8. Less Trust & AI

- Ireland has less trust than the global average that that companies that use artificial intelligence will protect their personal data (42% Ireland, 47% global)
- Ireland is the only country where people are more likely to trust people to discriminate less than AI.

9. Acute level of concern about Tech impact on Society

- Not surprisingly given our tech gearing, 70% of family teen households feel tech has a negative impact on family life in the home.
- 29% find it hard to switch off.

FINDINGS

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

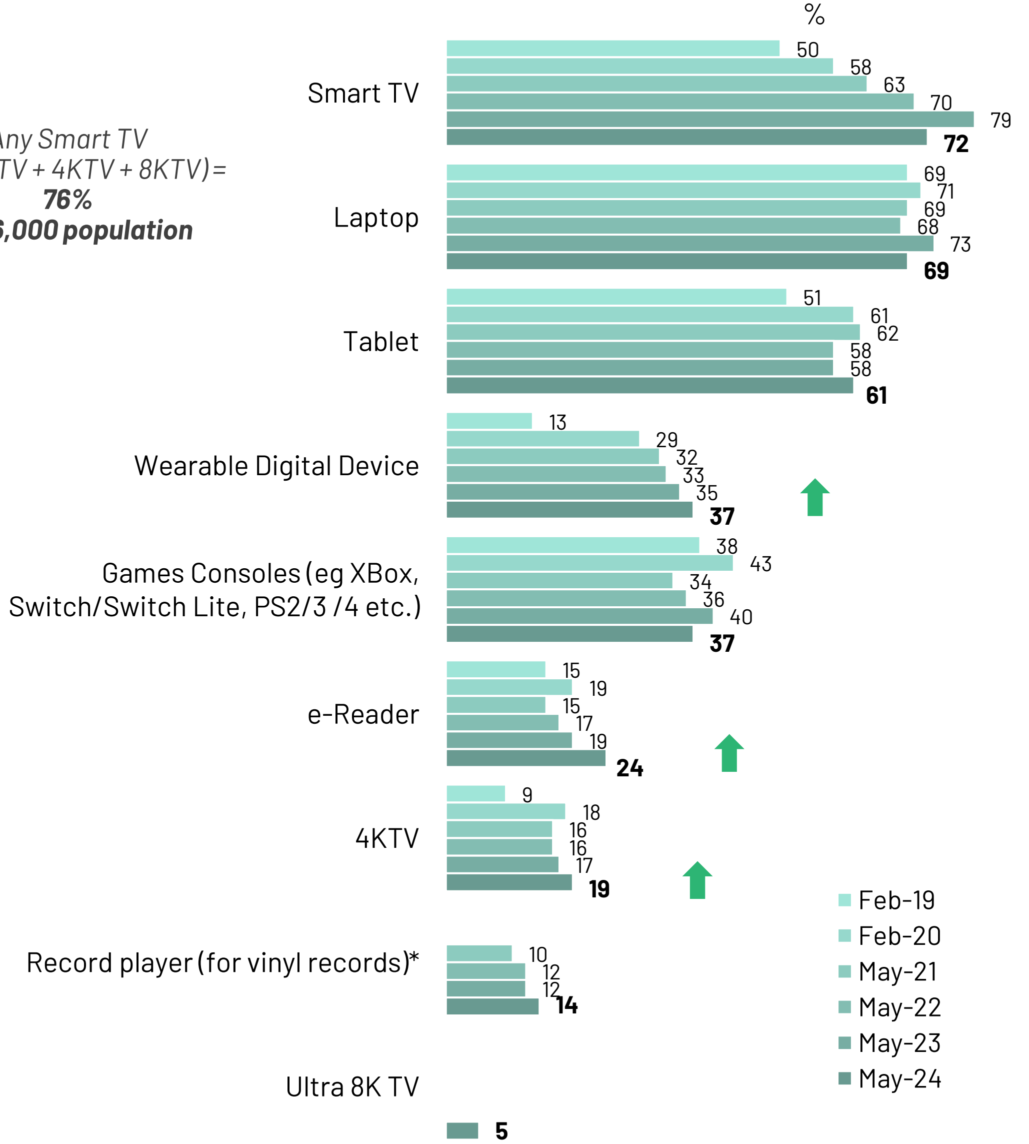
An increasingly connected Irish consumer:

Growth in 'better smart TVs, wearables, e-readers.

Base: All adults aged 16+ - 1,000

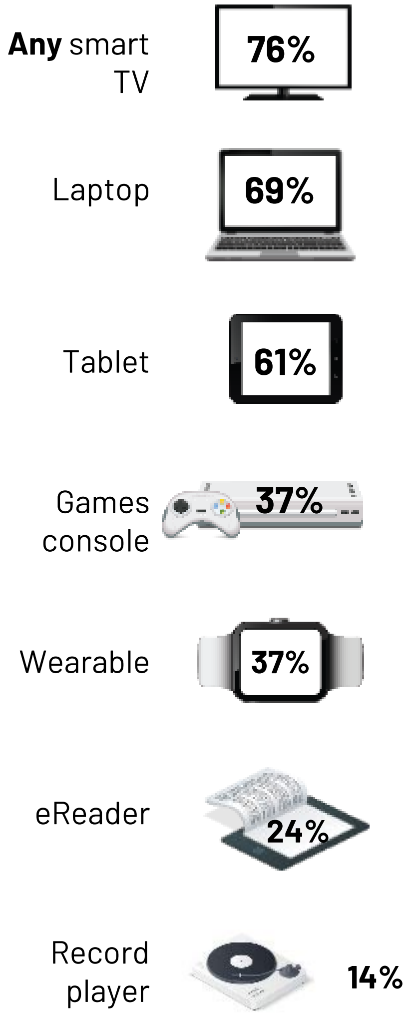
Any Smart TV
(Smart TV + 4KTV + 8KTV) =
76%
3,126,000 population

Devices in Home Trended



*Added 2024

2024 Totals

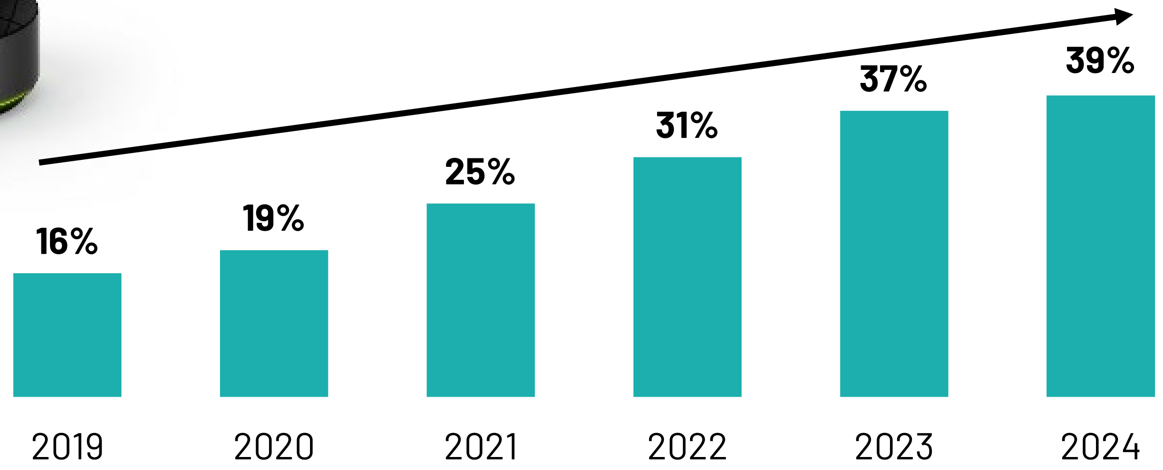


Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

The ‘connected home’ has grown substantially in the last 5 years

39%

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



Ownership of smart hubs peaks amongst Gen Z (53%).

Generations

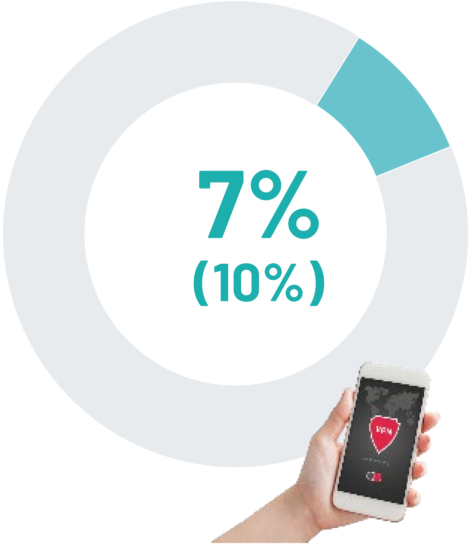
		± vs 2023
Gen Z	53%	+10%
Millennials	45%	-3%
Gen X	45%	+4%
Baby Boomers	20%	-3%
Silent Gen	10%	+2%

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

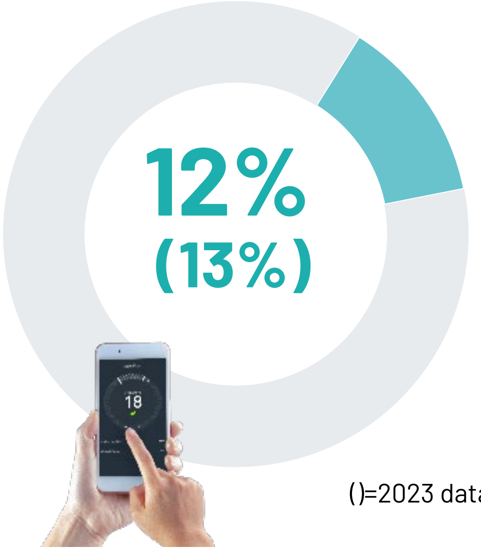
= Significantly higher = Significantly lower

Other tech in the home such as smart heating devices have remained relatively steady

VPN/Proxy server



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



()=2023 data

Generations

	VPN/ Proxy Server	Smart home heats Devices (e.g. Hive/Nest)
Gen Z	8%	15%
Millennials	10%	14%
Gen X	9%	15%
Baby Boomers	4%	9%
Silent Gen	0%	2%

Older generations continue to show lower usage.

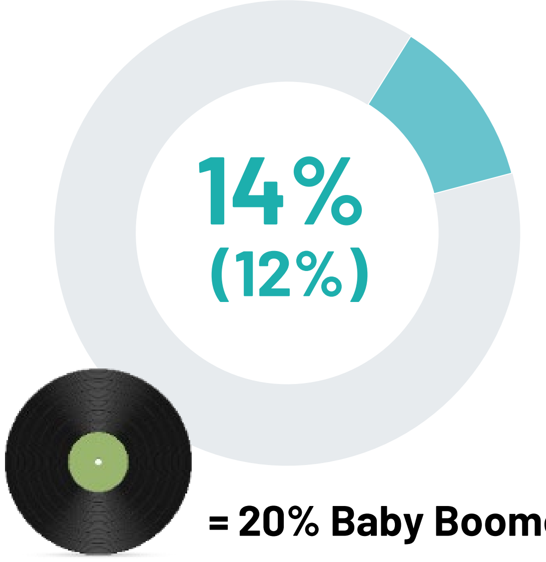
= Significantly higher = Significantly lower

Usage of 'retro' devices remains steady

Basic Mobile Phone

= 59% Silent Gen

Vinyl Records



= 20% Baby Boomers

() = 2023 data

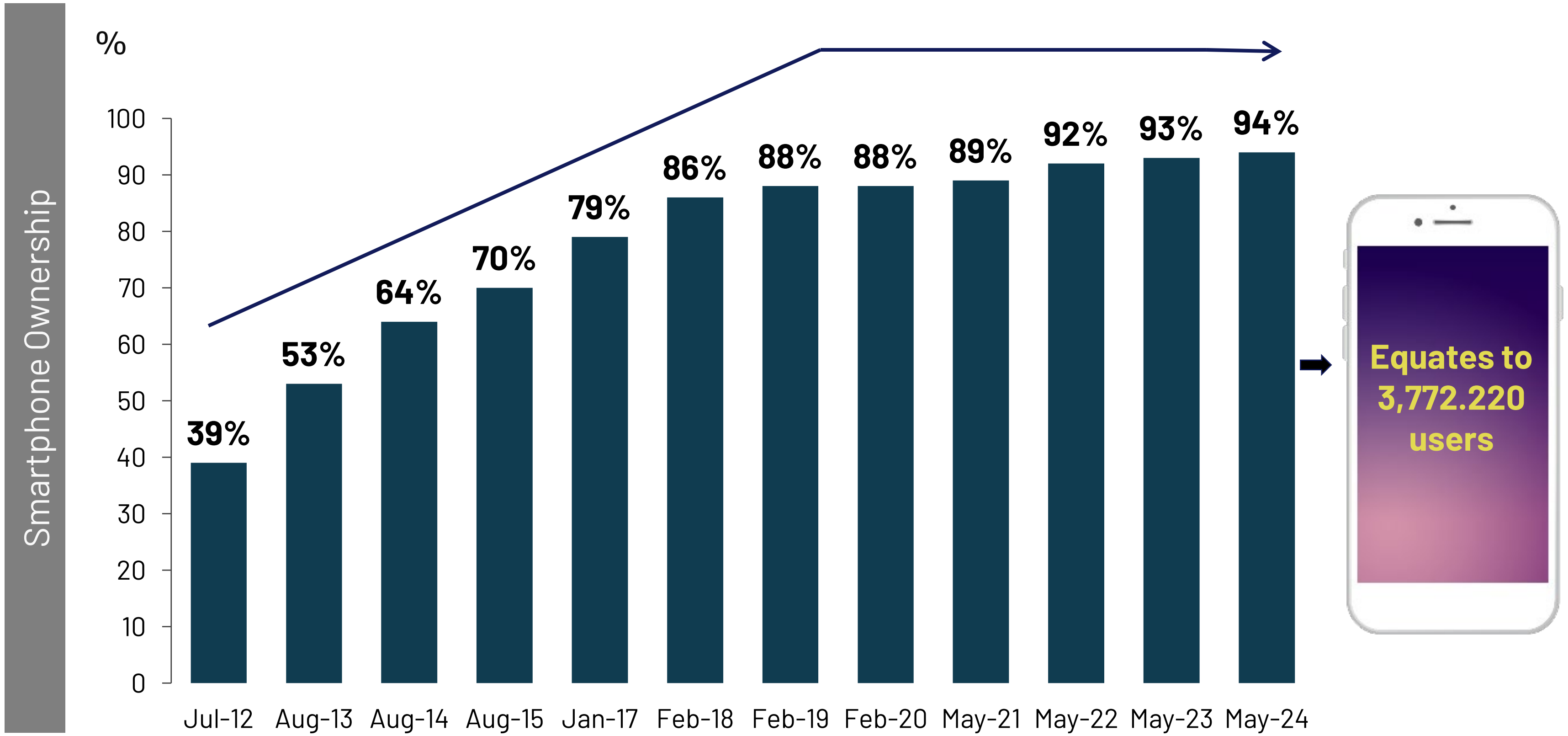
Generations

	Basic Mobile Phone	Vinyl Records
Gen Z	18%	10%
Millennials	16%	9%
Gen X	16%	17%
Baby Boomers	25%	20%
Silent Gen	59%	12%

= Significantly higher = Significantly lower

9 in 10 mobile phone users have a smart phone

Base: All respondents with mobiles – 968



Generations

Gen Z	100%
Millennials	100%
Gen X	98%
Baby Boomers	86%
Silent Gen	39%

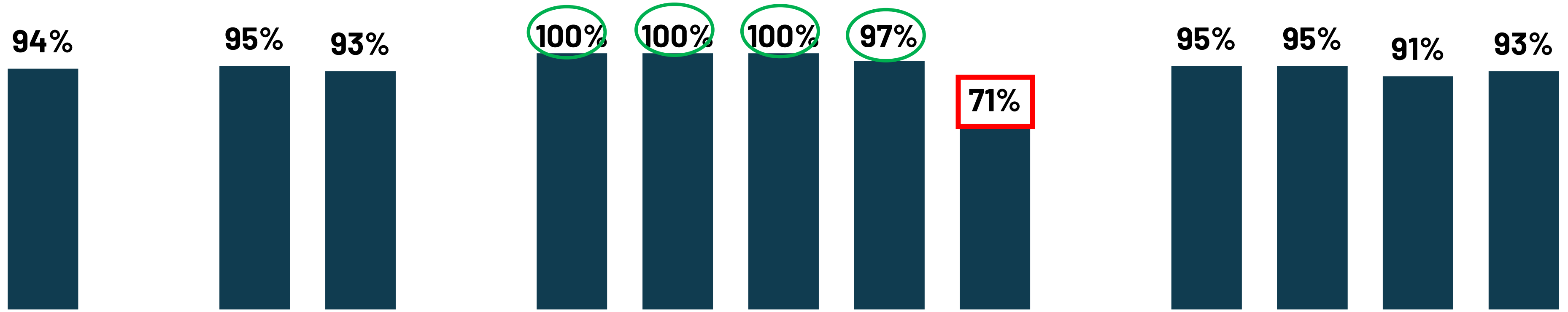
Pre-January 2017 comparable data from eir Connected Living Survey 2015

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

Growth in smartphone ownership among the over 65s has plateaued

Base: All respondents with mobiles – 968



	Total	Gender		Age					Region			
		Male	Female	16-24	25-34	35-49	50-64	65+	Dublin	Leinster	Munster	Conn/ Ulster
	%	%	%	%	%	%	%	%	%	%	%	%
% 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
% Aug '14	64	66	64	85	84	74	43	18	75	66	57	57

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

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

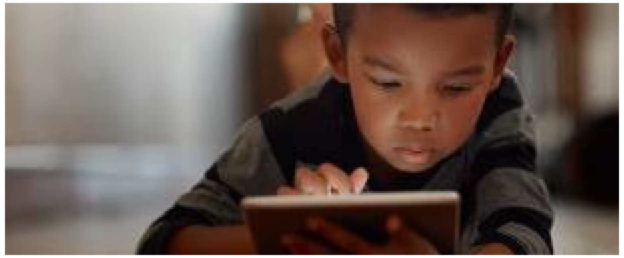
= Significantly higher = Significantly lower

Average number of smart devices in the house has increased to 9, with usage continuing to be driven by households with pre-teens (12) and teens (12)

Families with teenagers have an average of

12 SMART*

devices at home



Families with pre-teens have an average of

12 SMART*

devices at home

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

Total Pop.
2020 Average = 7
2021 Average = 7
2022 Average = 8
2023 Average = 8
2024 Average = 9

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

Generations
(Average No.)

		± vs 2023
Gen Z	11	(+1)
Millennials	9	(-)
Gen X	10	(+1)
Baby Boomers	5	(-1)
Silent Gen	2	(-2)

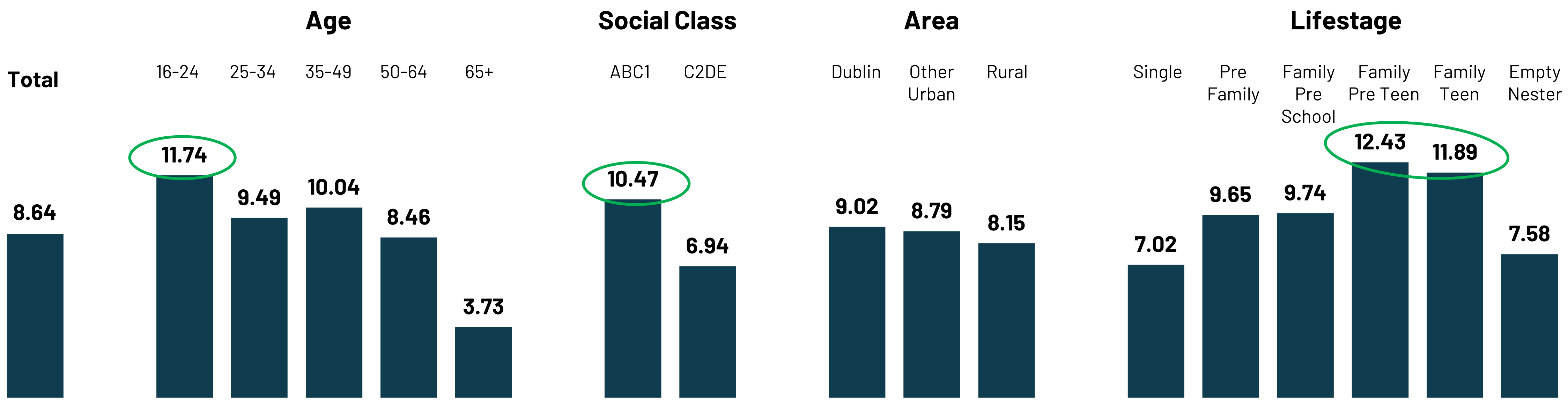
*Defined as smart device (e.g. Smart TV, wearable, laptop, games console , tablet, streaming device, smart speakers, smart home device, ereader)

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

= Significantly higher = Significantly lower

On average, Irish homes have access to 8-9 smart devices* at home

May 2024



Fragmentation of Society

= Significantly higher   = Significantly lower

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

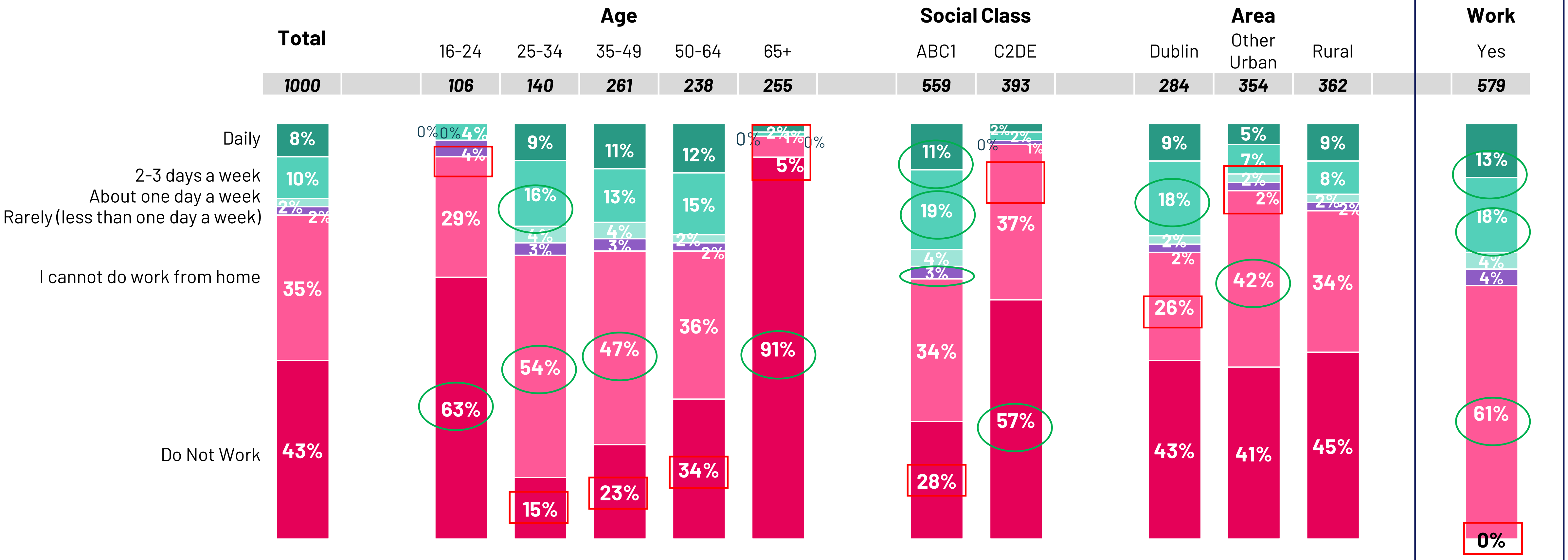
Q.2 And how many ...SMART DEVICES are in the household?

*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, BUT IS A MIDDLE CLASS, DUBLIN PHENOMENON

1 in 3 worker WFH 2+ days a week, but it is mostly middle class and Dublin centric

Base: All respondents 1,000



	Total	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Other Urban	Rural	Work Yes
Any working from home %	22	8	31	31	30	4	38	6	31	17	21	39
Any working 2+ days from home %	18	4	25	24	26	3	31	4	27	12	17	31

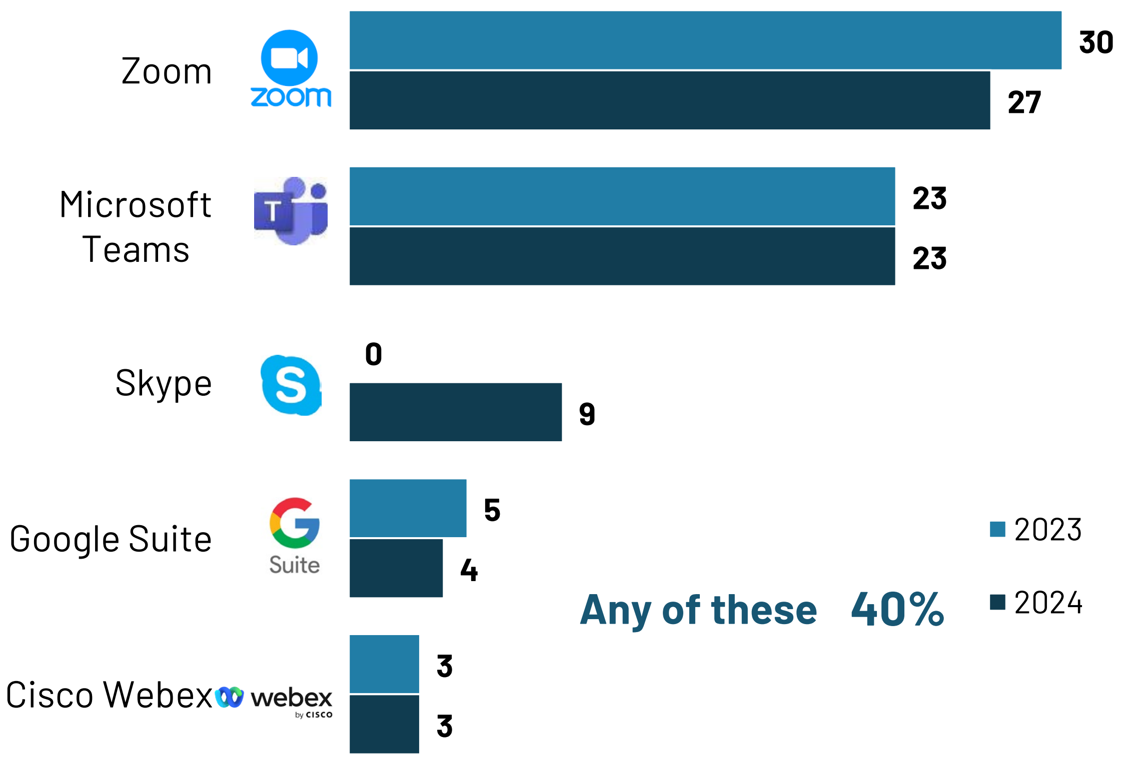
Q.15 At the moment how often, if at all, do you work from home during the working week?

= Significantly higher = Significantly lower

40% of the population use one of these video platforms: Zoom still edges ahead of Microsoft Teams.

Base: All respondents 1,000

Total
%



Any of these 40%

ALL currently WFH *(Base: 243)* %
56
58
10
9
10
82%

82%

working from home using at least one of these platforms

Non-usage by Age:

16-24	59
25-34	46
35-49	48
50-64	57
65+	91

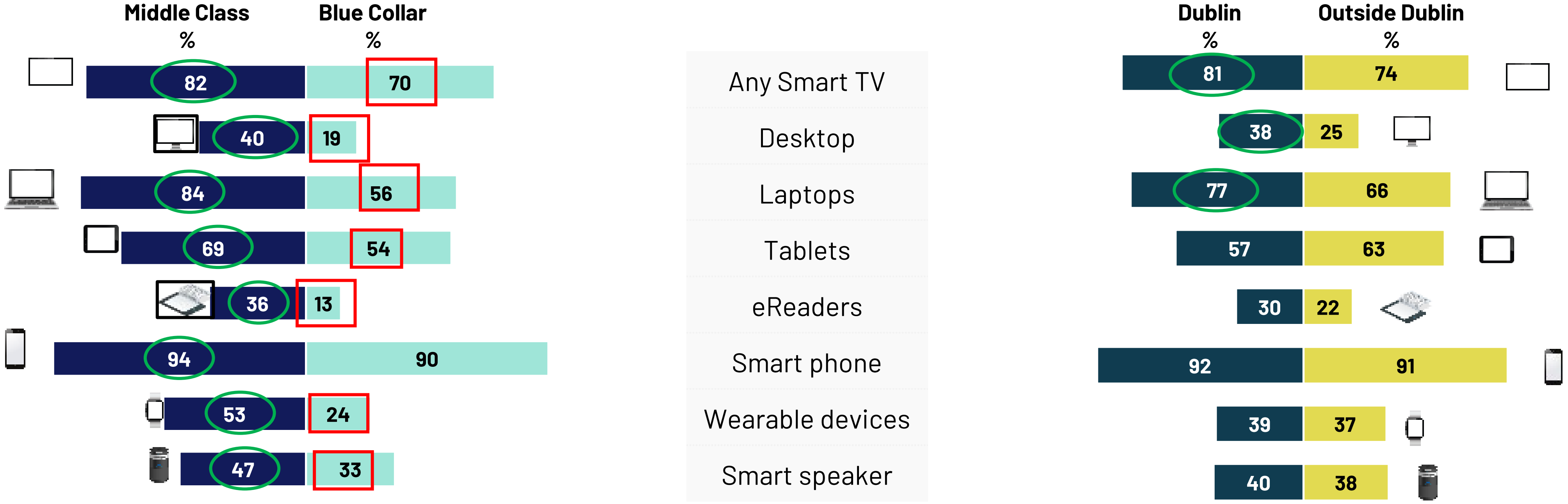
= Significantly higher   = Significantly lower

Q.16 What platforms are you using nowadays?

THE SOCIO-ECONOMIC TECH DIVIDE PERSISTS, BUT SIGNS THAT REGIONAL DIVIDE IS LESSENING

A socio-economic tech divide continues to permeate Irish society, but signs regional divide is lessening

Middle class (ABC1) (559) Vs Blue Collar (C2DE) (393) and Dublin (284) 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 (-14%pts), Catchup TV (-10%pts), stream music (-24%pts), online banking (-18%pts), podcasts (-19%pts).

Less likely to use social media sites (-11%pts) & buy online: 71% C2DE vs 89% ABC1. However, the gap is closing here (71% C2DE vs 89% ABC1 in 2023)

Outside Dublin catching up in terms of smart devices
- Dublin 9 devices
- Outside 9 devices

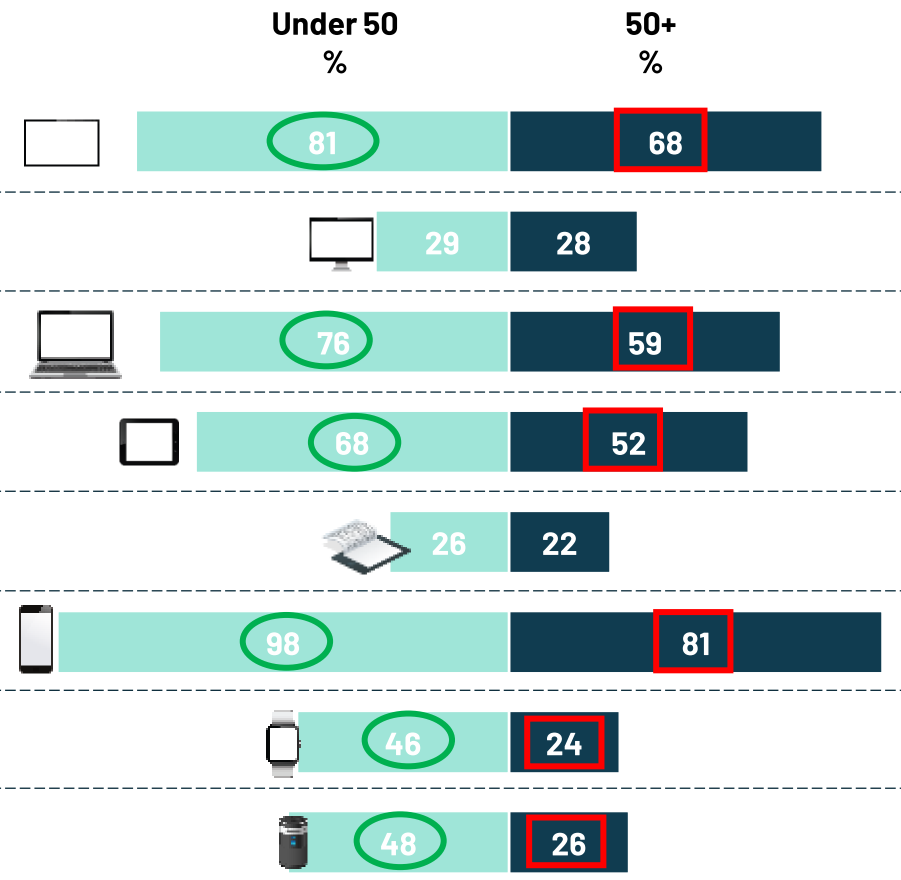
When focusing on specific devices, those in Dublin show higher usage in only 4 areas (work email, WhatsApp / Viber calling, cloud applications, and digital financial products.
Those living in **Dublin are more likely to agree** that "BB is more important than TV" vs Non-Dubliners

= Significantly higher = Significantly lower

A generational divide still very much at play

Aged under 50 Vs Aged 50+ and Generations comparison

= Significantly higher   = Significantly lower



	Gen Z %	Millennials %	Gen X %	Baby Boomers %	Silent Gen %
Any Smart TV	87	80	76	68	34
Desktop	31	26	35	27	8
Laptops	77	76	77	57	16
Tablets	70	67	71	47	20
eReaders	23	27	31	20	6
Smart phone	98	98	98	81	35
Wearable devices	43	48	44	20	1
Smart speaker	53	45	45	20	10

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

- Under 50 10 devices
- 50+ 6 devices

Clear divide between generations: number of smart devices in house

- **Gen Z 11 devices**
- **Millennials 9 devices**
- Gen X 10 devices
- Baby Boomers 5 devices
- Silent Gen 2 devices

Growth is at the younger end of the market

54%

More older cohorts (65+ years) now using the internet daily +

Up from 51% in 2023

Internet usage continuing to creep up, albeit only marginal compared to previous years

Increase in YOY daily internet usage as

(85%) **88%**

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

(51%) **54%**

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

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

( ) = 2023 data

Generations

		± vs 2023
Gen Z	98%	=
Millennials	97%	=
Gen X	98%	+7%
Baby Boomers	73%	+9%
Silent Gen	24%	-13%

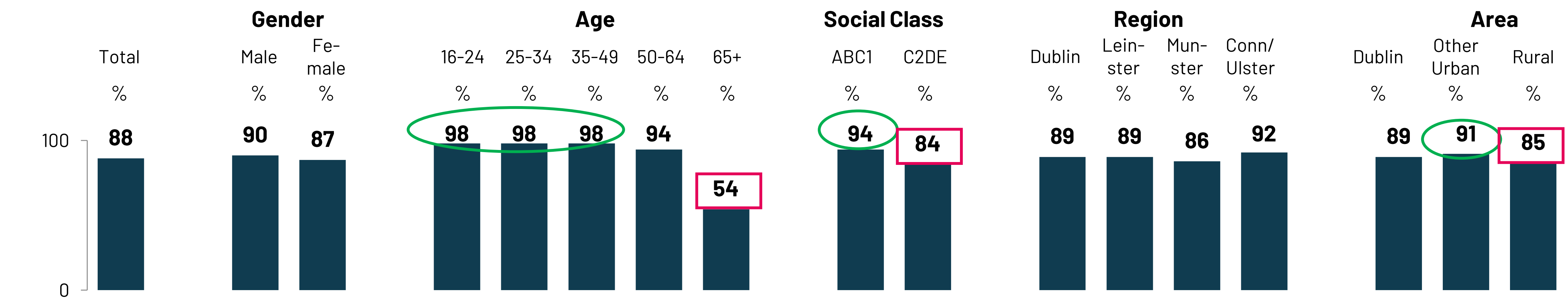
○ = Significantly higher □ = Significantly lower

Ipsos B&A

9 in 10 of us access the internet once a day or more often, with a narrowing of the divide between social class cohorts and Dublin vs rural

Base: all Adults 16+ - 1,000

% 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 '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

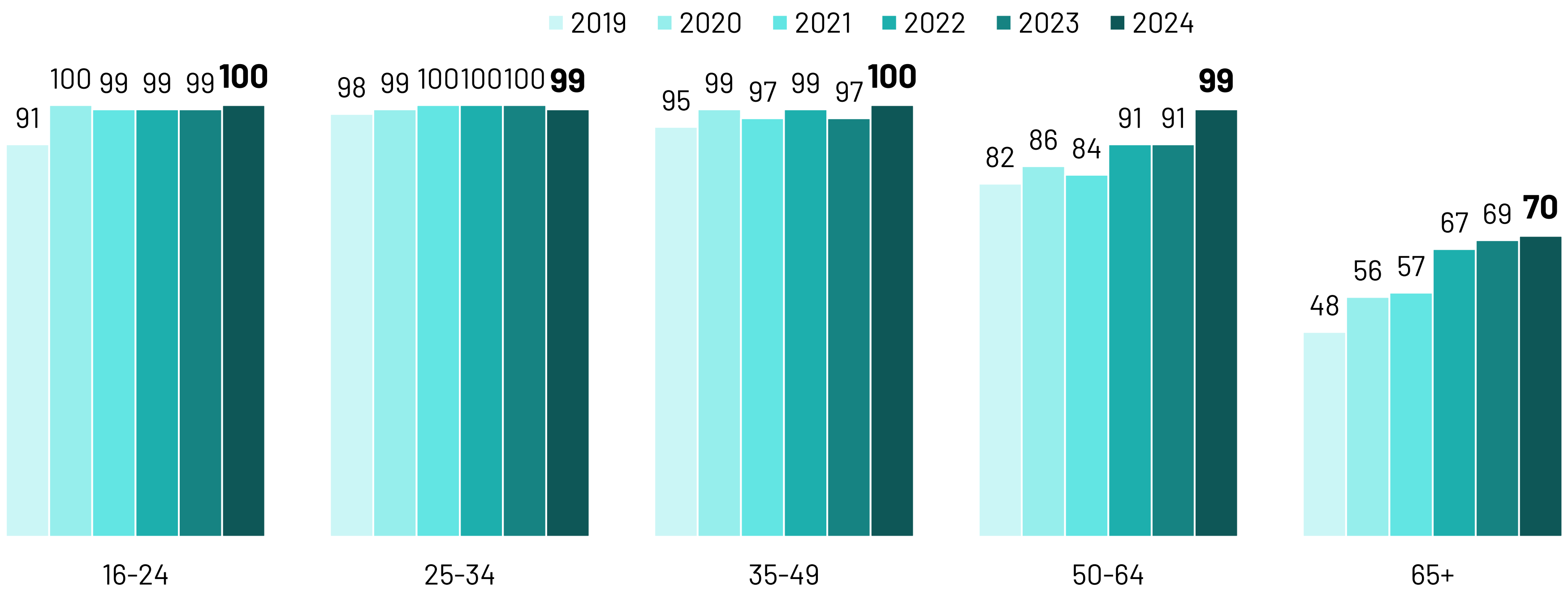
= Significantly higher = Significantly lower

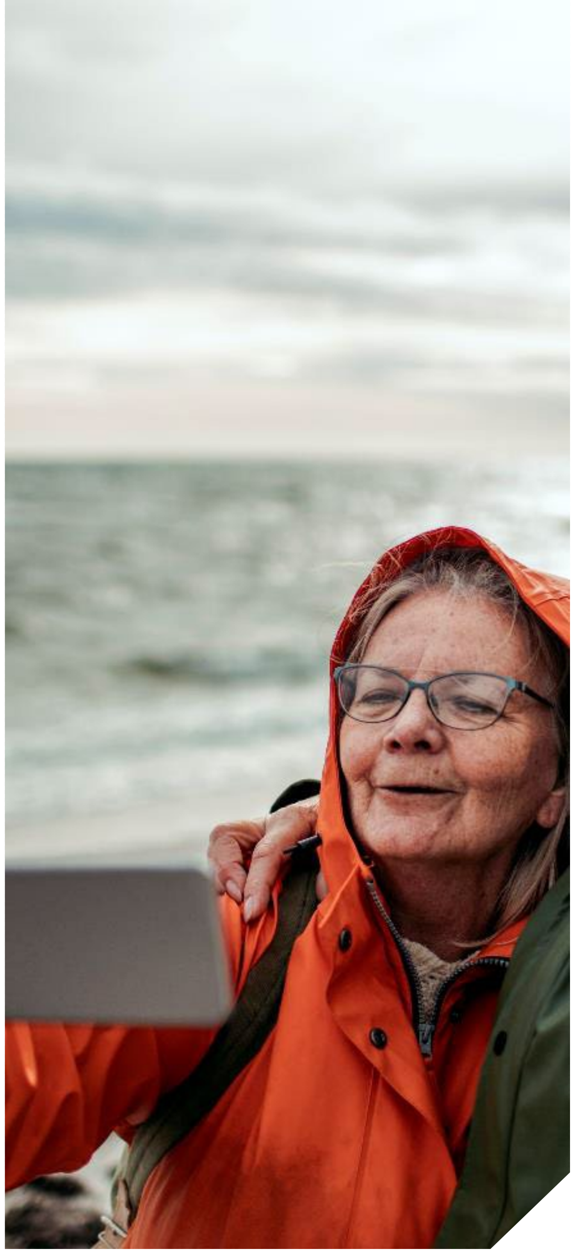
Q.4 How often do you yourself access the internet nowadays?

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





7 in 10 over 65s are using the internet to any extent.

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

USAGE OF AND ATTITUDES TOWARDS AI

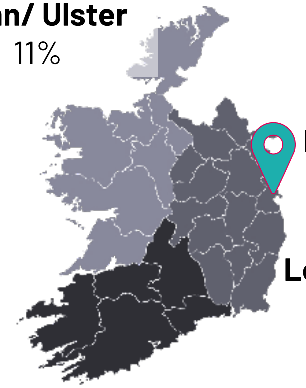
Chat GPT/other Gen AI usage

16%

of pop.

(647,000 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
23%	8%

Generations

Gen Z	26%
Millennials	22%
Gen X	14%
Baby Boomers	3%
Silent Gen	-

◯ = Significantly higher ▭ = Significantly lower

* Wording change in 2024

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

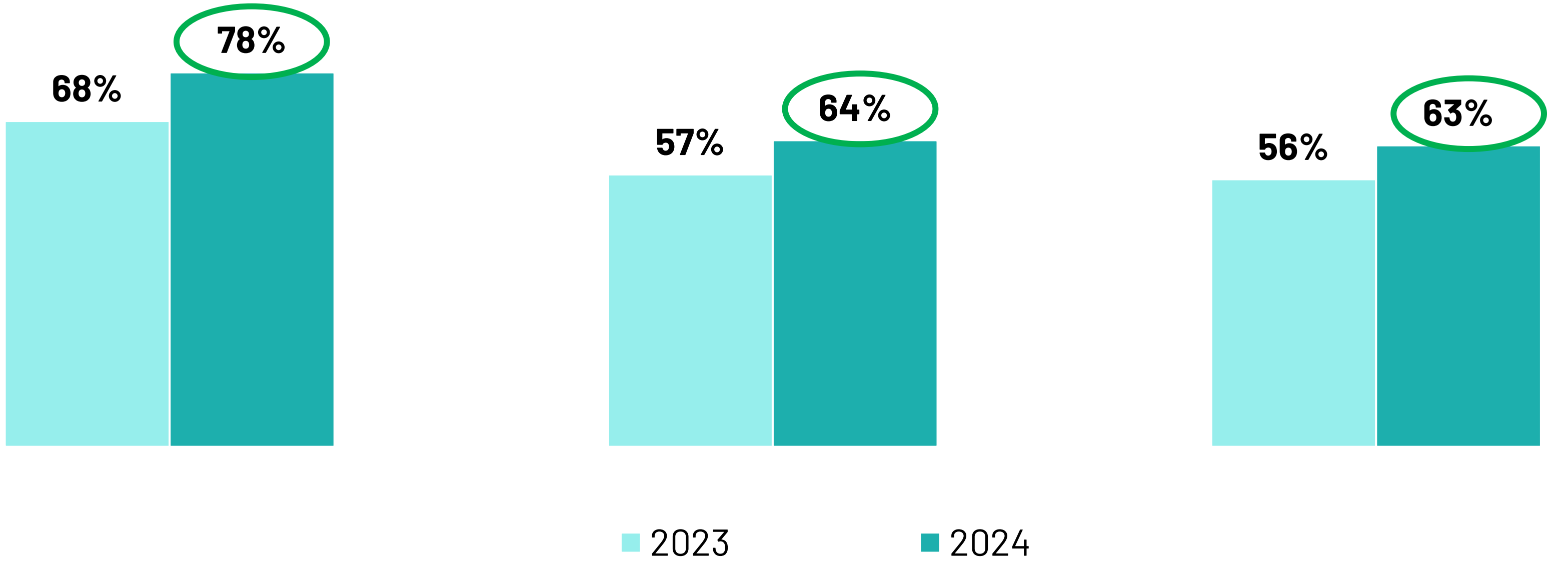
Growing concerns in 2024 that ...

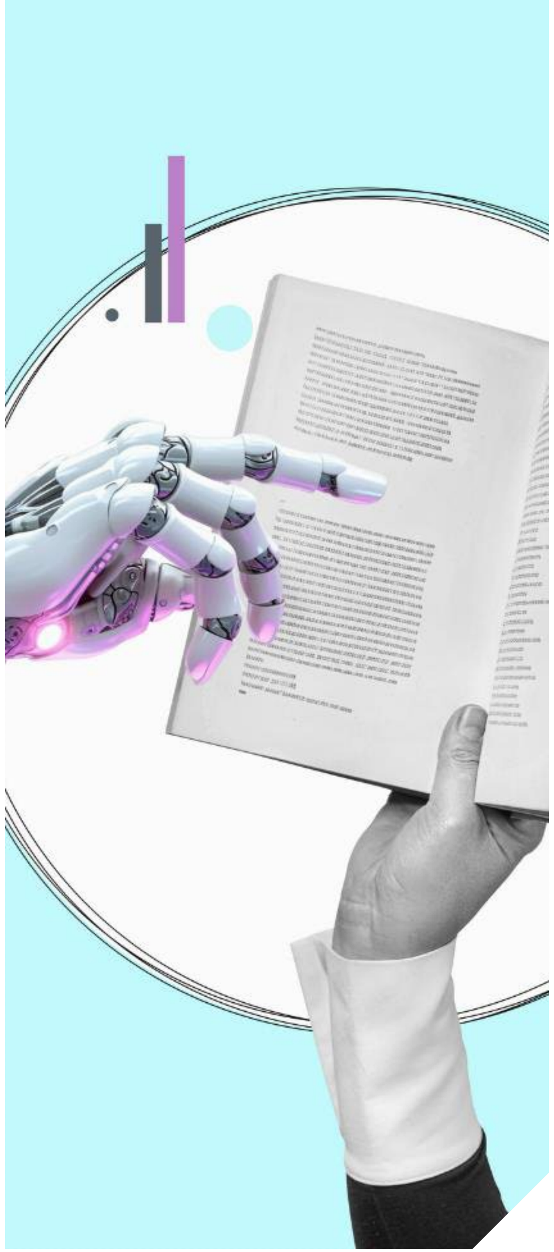
Base: all Adults 16+ - 1,000

AI tools need to be regulated

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

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





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

= Significantly higher
= Significantly lower

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

Base: All adults 16+ - 1,000

	Any agree 2024 %	Gen Z	Mille-nnials	Gen X	Baby Boomers	Silent Gen
		163	252	220	312	53
		%	%	%	%	%
I am concerned in general nowadays regarding how my data is used by organisations	69	68	70	78	63	46
I am concerned about the growth in AI (Artificial Intelligence)	68	64	71	75	63	63
I fear that AI tools like ChatGPT will replace many peoples' jobs	64	60	66	71	60	59
I fear that AI tools like ChatGPT will hinder students' ability to learn in schools and universities	63	56	65	71	62	51
I follow a lot of celebrities, youtubers or "influencers"	26	55	32	15	7	2
I feel that AI tools need to be regulated	78	78	80	87	71	48
Technology is having a negative impact on family life in my home (e.g. people spending too much time on different devices, etc)	41	34	52	48	31	21

Significantly higher Significantly lower

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

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
Global Country Average	67%	25%	67%
Indonesia	86%	9%	84%
Mexico	80%	15%	75%
Peru	79%	16%	73%
South Africa	76%	19%	78%
Thailand	75%	17%	78%
Hungary	75%	16%	73%
Türkiye	74%	19%	73%
Argentina	72%	19%	67%
South Korea	72%	25%	76%
China	72%	22%	N/A
Colombia	71%	20%	73%
Netherlands	70%	23%	71%
New Zealand	69%	27%	62%
United States	68%	26%	67%
Poland	67%	19%	69%
Singapore	67%	26%	67%
Ireland	66%	28%	58%
Canada	65%	27%	59%
Spain	65%	22%	66%
Chile	65%	23%	70%
Belgium	65%	26%	56%
Sweden	65%	29%	67%
India	64%	19%	64%
Brazil	64%	26%	74%
Australia	63%	31%	59%
Great Britain	63%	29%	64%
Malaysia	61%	30%	65%
France	61%	32%	58%
Germany	60%	28%	61%
Switzerland	57%	37%	N/A
Italy	51%	39%	53%
Japan	44%	44%	43%

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

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
Global Country Average	52%	34%	51%
China	81%	13%	N/A
Indonesia	80%	13%	76%
Thailand	69%	22%	73%
Türkiye	67%	21%	71%
Mexico	65%	25%	61%
Peru	65%	25%	65%
South Korea	65%	31%	68%
South Africa	64%	25%	60%
India	62%	21%	62%
Malaysia	61%	23%	68%
Colombia	60%	25%	53%
Brazil	57%	27%	62%
Singapore	56%	30%	57%
Chile	53%	32%	58%
Argentina	51%	28%	44%
Italy	51%	33%	50%
Poland	47%	29%	46%
Spain	46%	34%	46%
Switzerland	42%	44%	N/A
France	41%	46%	37%
Hungary	41%	41%	37%
Germany	41%	43%	39%
Great Britain	40%	44%	43%
Ireland	40%	47%	36%
Japan	40%	43%	38%
New Zealand	40%	49%	35%
United States	39%	43%	35%
Sweden	39%	47%	36%
Australia	38%	48%	38%
Belgium	37%	47%	35%
Netherlands	37%	48%	42%
Canada	36%	46%	38%

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

Ireland has lower than average knowledge of which types of products and services use AI (40% AGREE THEY KNOW IN IRELAND VS 52% GLOBALLY)

How much do you agree or disagree with the following?

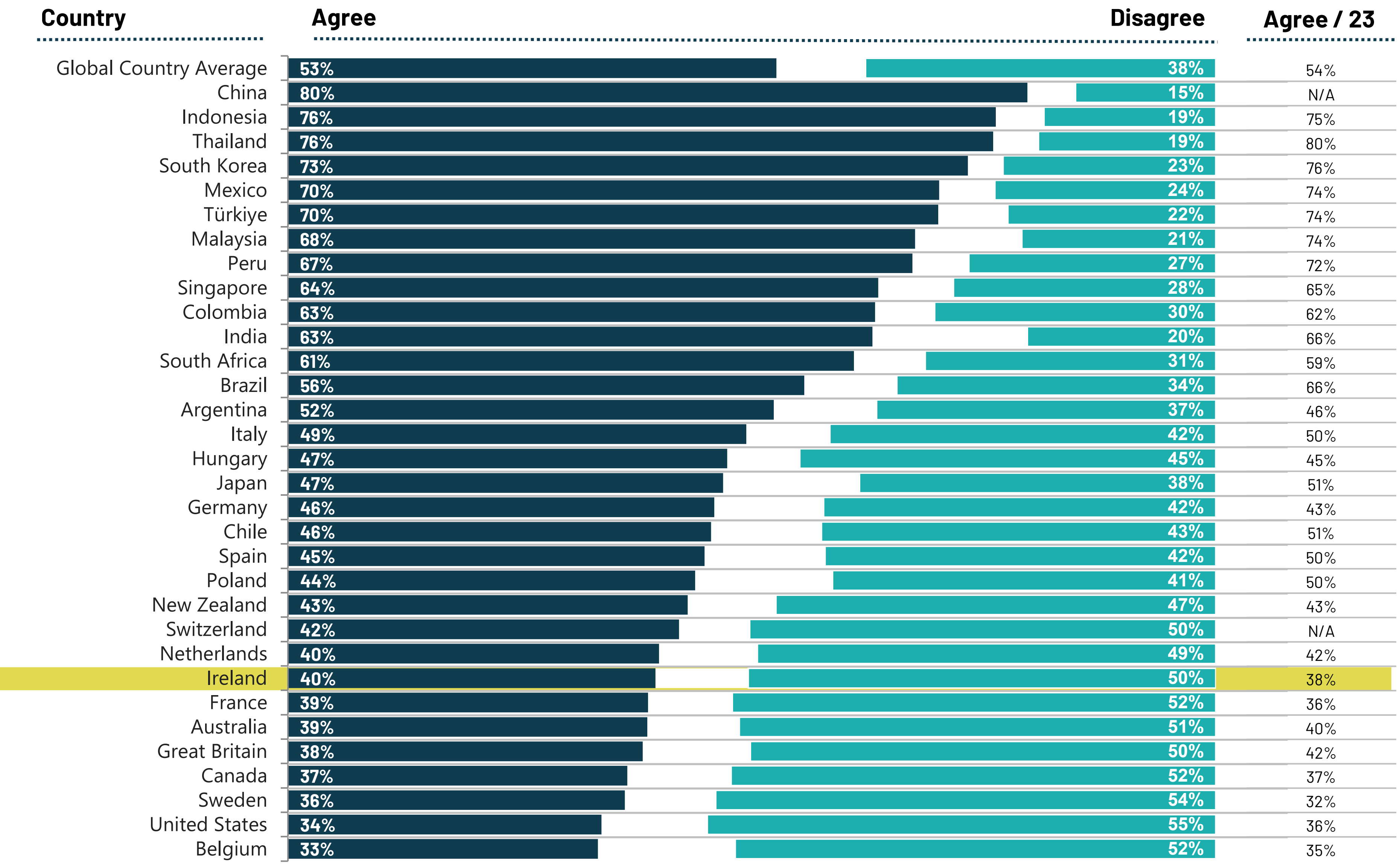
Products and services using artificial intelligence make me nervous

Country	Agree	Disagree	Agree / 23
Global Country Average	50%	41%	52%
Ireland	67%	27%	62%
New Zealand	66%	28%	63%
Great Britain	64%	28%	65%
United States	64%	28%	63%
Australia	64%	29%	69%
Canada	63%	27%	63%
Singapore	56%	35%	53%
Sweden	56%	37%	53%
South Africa	54%	42%	53%
Türkiye	53%	40%	54%
Thailand	52%	40%	57%
Chile	51%	41%	54%
India	51%	31%	58%
Belgium	51%	37%	50%
Switzerland	51%	41%	N/A
Malaysia	50%	36%	55%
Peru	50%	45%	47%
Netherlands	49%	42%	50%
France	49%	43%	52%
Colombia	48%	46%	45%
Spain	48%	40%	51%
Indonesia	48%	48%	48%
Mexico	48%	46%	48%
Argentina	47%	44%	46%
Brazil	47%	43%	51%
Germany	44%	46%	46%
Hungary	44%	48%	46%
Italy	43%	47%	50%
South Korea	40%	55%	44%
Poland	37%	49%	38%
China	34%	59%	N/A
Japan	25%	54%	23%

Ireland has the highest level of nervousness of products and services using AI (67% AGREE IN IRELAND VS 50% GLOBALLY)

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

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



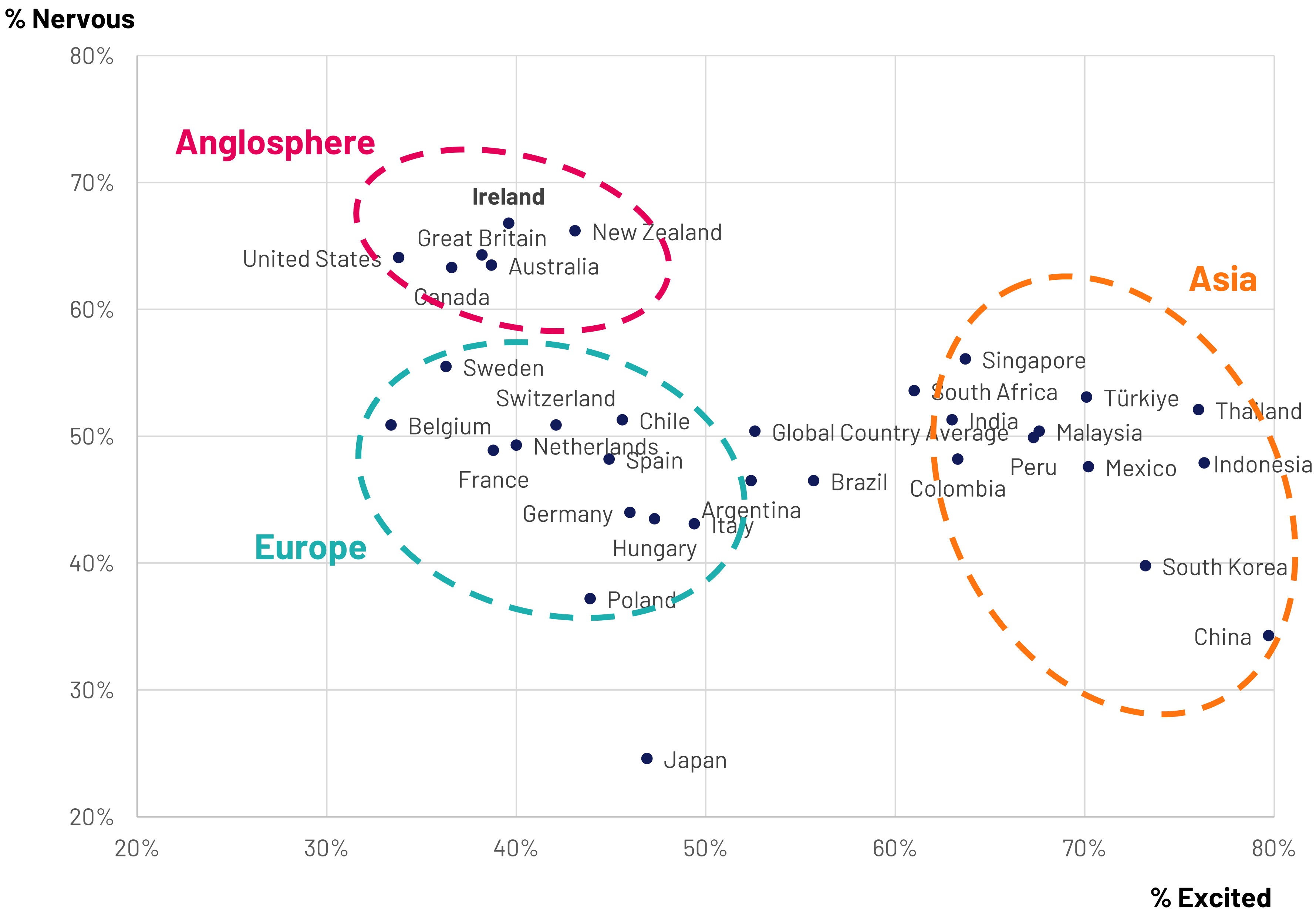
Base: 23,685 online adults under age 75 across 32 countries, interviewed April 19 – May 3, 2024

Ireland has lower than average excitement re products and services using AI

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



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
Global Country Average	55%	29%	54%
China	83%	10%	N/A
Indonesia	80%	14%	78%
Thailand	77%	16%	74%
Peru	70%	23%	67%
Mexico	70%	21%	73%
Türkiye	69%	20%	67%
Colombia	66%	25%	65%
Singapore	66%	20%	64%
South Korea	66%	25%	66%
Malaysia	63%	25%	69%
South Africa	62%	25%	59%
India	62%	20%	65%
Chile	60%	27%	59%
Argentina	57%	27%	57%
Brazil	56%	30%	64%
Italy	53%	33%	55%
Hungary	51%	32%	47%
Spain	50%	31%	50%
New Zealand	48%	32%	44%
Japan	48%	27%	52%
Germany	47%	33%	42%
Great Britain	46%	31%	46%
Ireland	45%	38%	40%
Australia	44%	37%	40%
Poland	44%	31%	47%
Sweden	43%	36%	39%
Switzerland	42%	41%	N/A
France	41%	39%	37%
Canada	40%	36%	38%
United States	39%	41%	37%
Belgium	38%	34%	39%
Netherlands	36%	42%	43%

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

Ireland has lower than average agreement that products and services using AI have more benefits than drawbacks (45% AGREE IN IRELAND VS 55% GLOBALLY)

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
Global Country Average	47%	41%	50%
Thailand	68%	22%	72%
Indonesia	66%	24%	68%
China	66%	24%	N/A
Hungary	64%	27%	60%
Mexico	64%	28%	66%
Peru	62%	33%	60%
South Africa	62%	33%	58%
India	60%	23%	64%
Italy	58%	32%	59%
Singapore	56%	32%	54%
Malaysia	52%	34%	61%
Colombia	50%	42%	53%
Spain	48%	37%	49%
Argentina	46%	43%	45%
Türkiye	46%	43%	57%
Poland	45%	33%	55%
Brazil	45%	42%	56%
Netherlands	44%	46%	47%
Switzerland	43%	48%	N/A
Chile	43%	45%	44%
Germany	43%	45%	44%
Ireland	42%	47%	38%
Great Britain	41%	47%	42%
Belgium	40%	48%	41%
New Zealand	39%	51%	42%
South Korea	37%	56%	40%
France	35%	54%	32%
Sweden	35%	54%	39%
United States	33%	52%	32%
Australia	32%	57%	38%
Canada	28%	58%	34%
Japan	27%	48%	32%

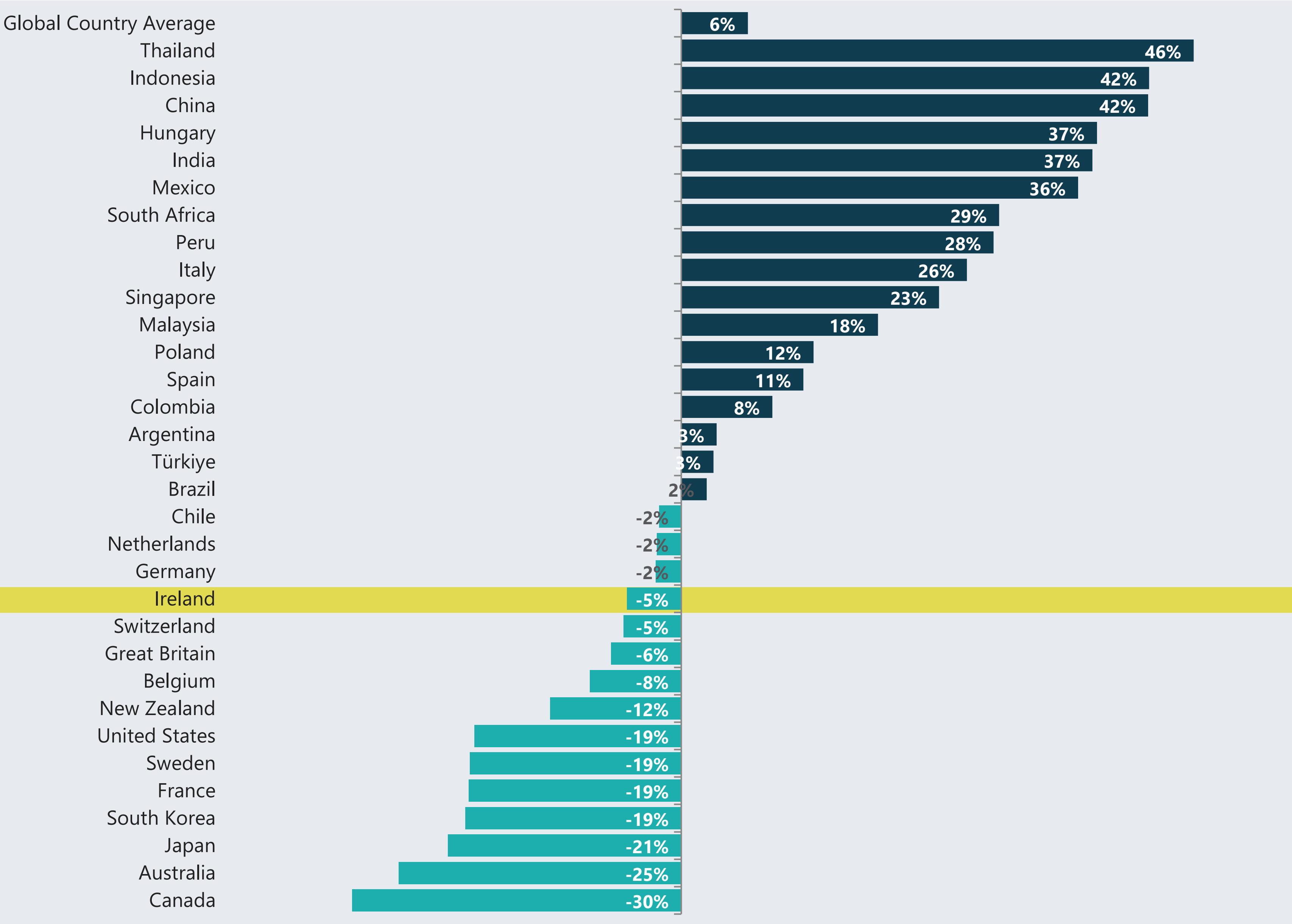
Base: 23,685 online adults under age 75 across 32 countries, interviewed April 19 – May 3, 2024

Ireland has less trust than the global average that that companies that use artificial intelligence will protect my personal data (42% AGREE IN IRELAND VS 47% GLOBALLY)

How much do you agree or disagree with the following?

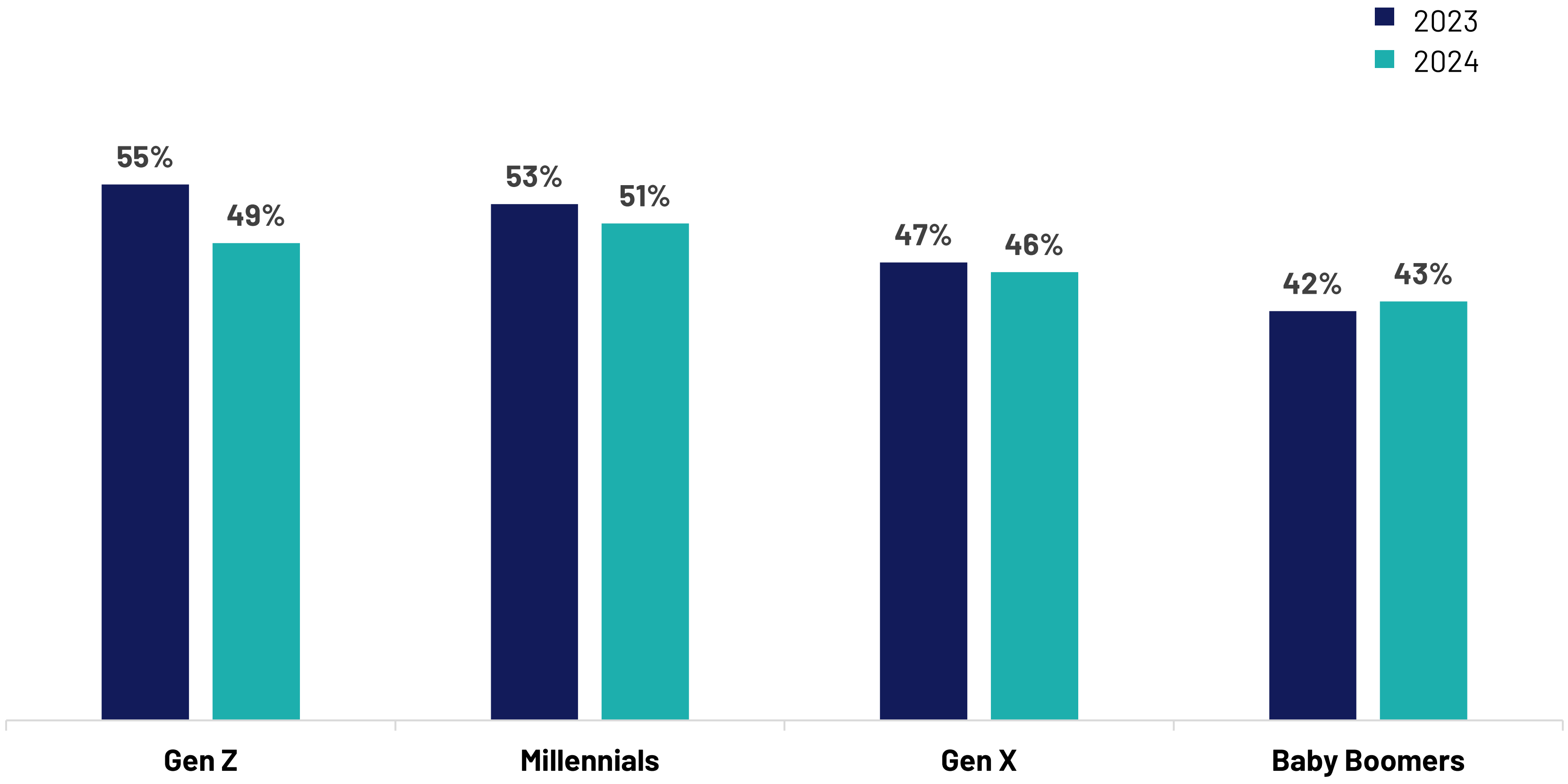
I trust that companies that use artificial intelligence will protect my personal data

Net agree



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

How much do you agree or disagree with the following? **I trust that companies that use artificial intelligence will protect my personal data**



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

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
Global Country Average	54%	33%	56%
China	76%	16%	N/A
Mexico	76%	17%	72%
Peru	74%	22%	72%
Thailand	73%	19%	83%
South Africa	72%	23%	65%
Indonesia	68%	22%	76%
Colombia	66%	25%	61%
Hungary	64%	24%	66%
India	63%	21%	66%
Malaysia	62%	26%	68%
Italy	61%	29%	59%
Türkiye	61%	29%	63%
Singapore	60%	28%	63%
Argentina	60%	26%	61%
Chile	59%	31%	60%
Brazil	56%	30%	66%
Poland	53%	27%	59%
Spain	52%	32%	51%
South Korea	51%	41%	55%
Germany	48%	36%	47%
Great Britain	44%	41%	47%
Switzerland	43%	45%	N/A
New Zealand	43%	46%	45%
Ireland	42%	44%	41%
Australia	42%	46%	44%
Canada	41%	44%	44%
France	41%	46%	37%
United States	41%	45%	38%
Japan	38%	39%	43%
Netherlands	38%	50%	42%
Belgium	37%	45%	41%
Sweden	33%	54%	33%

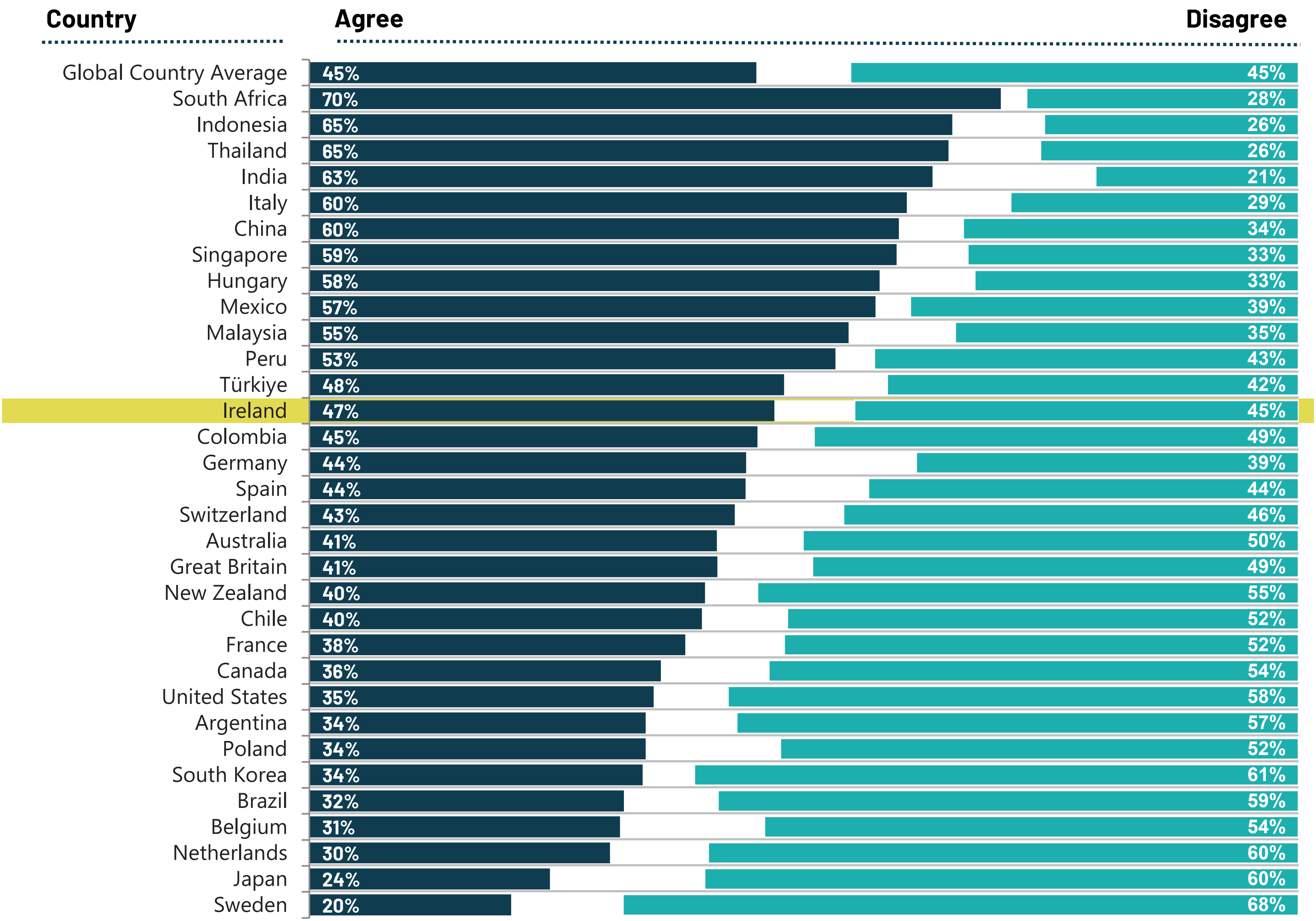
Base: 23,685 online adults under age 75 across 32 countries, interviewed April 19 – May 3, 2024

Ireland has less trust than the global average that artificial intelligence will not discriminate or show bias towards any group of people (42% AGREE IN IRELAND VS 54% GLOBALLY)

How much do you agree or disagree with the following?

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

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

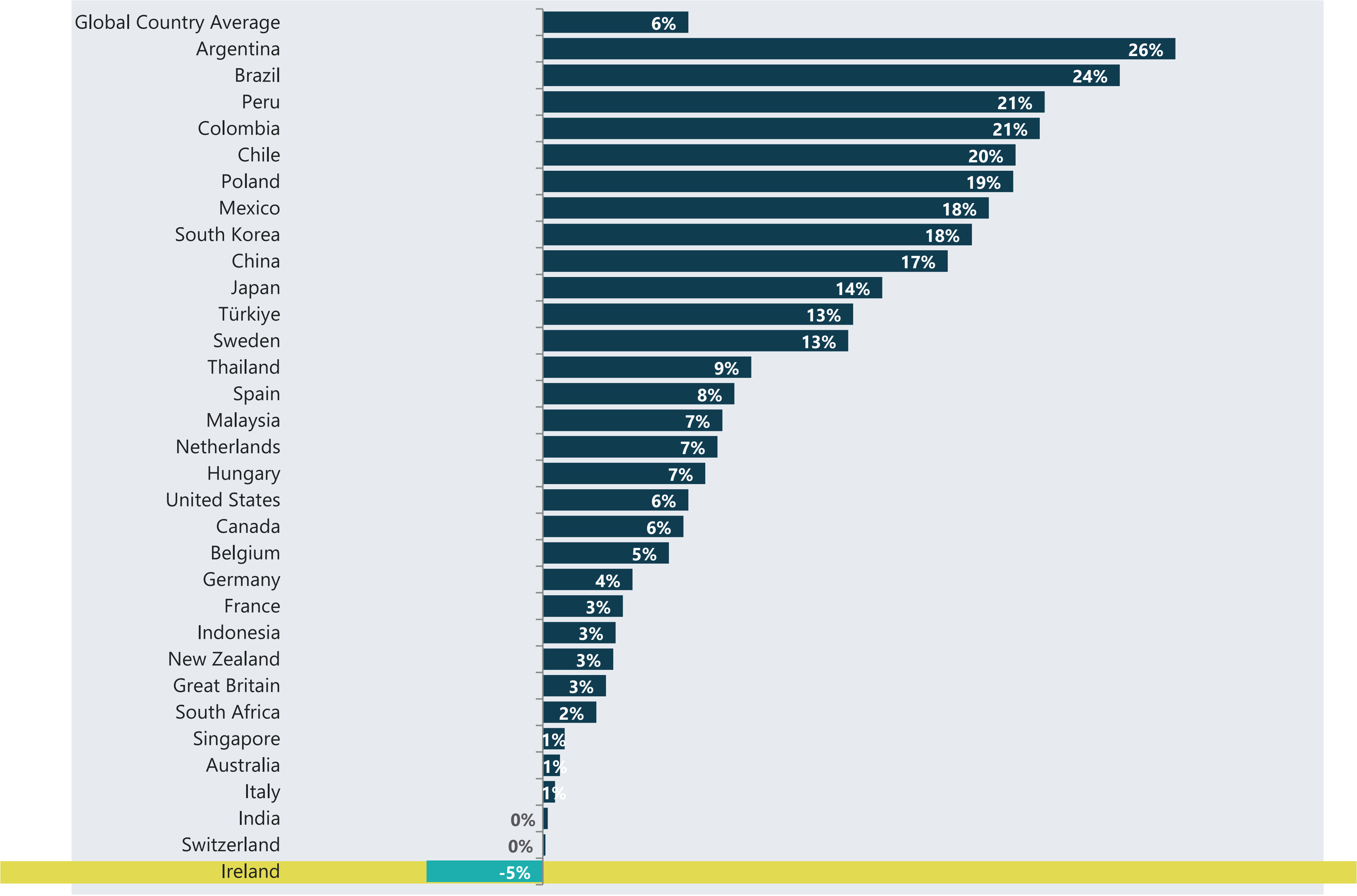


More trust in humans not to discriminate (compared to AI) in Ireland

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

More trust in humans not to discriminate (compared to AI) in Ireland. Ireland is the only country to display this trend.

AI AND THE FUTURE

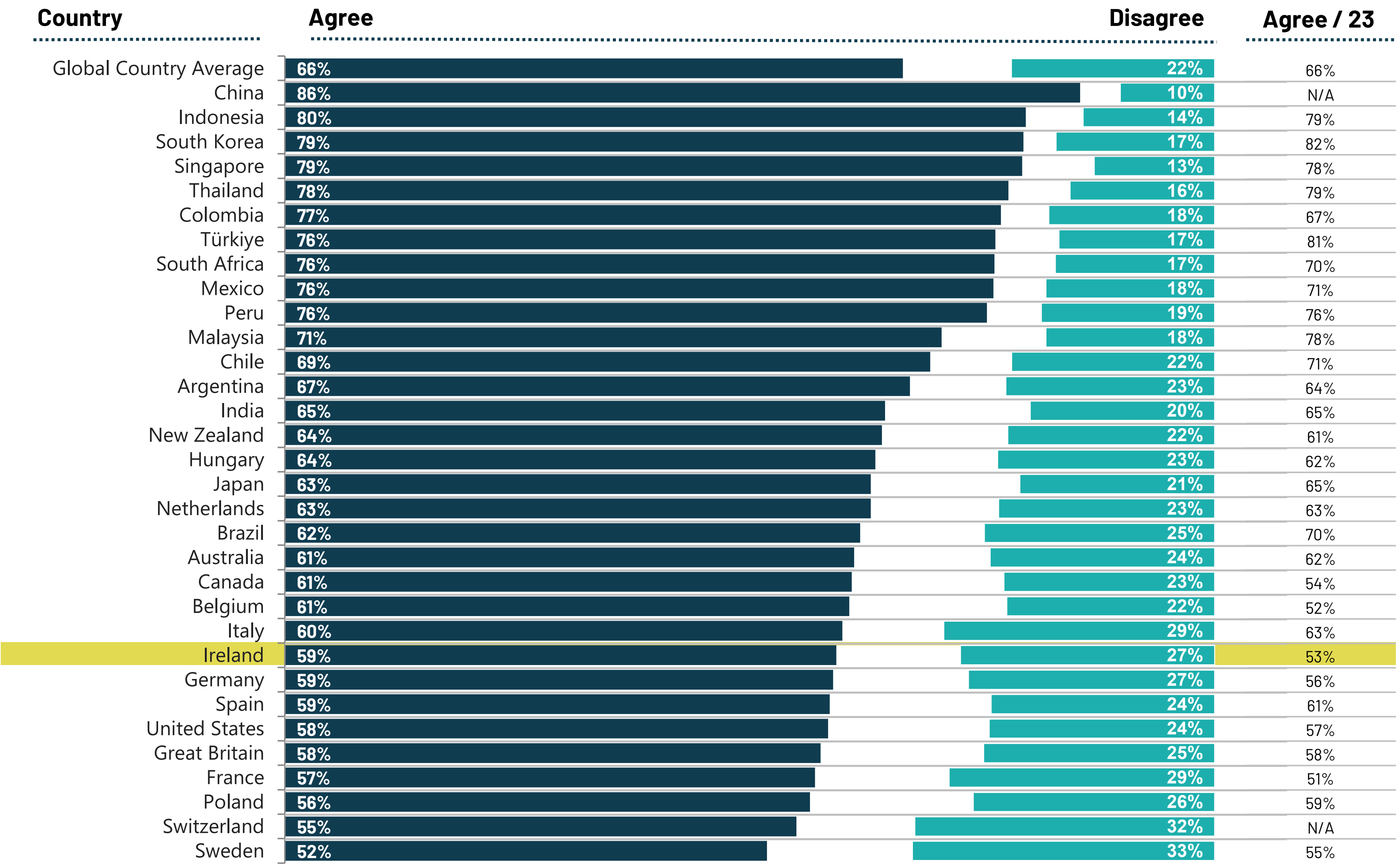
How much do you agree or disagree with the following? **Products and services using artificial intelligence have profoundly changed my daily life in the past 3-5 years**

Country	Agree	Disagree	Agree / 23
Global Country Average	50%	38%	49%
China	78%	17%	N/A
Thailand	73%	19%	72%
Indonesia	71%	23%	72%
South Korea	71%	24%	73%
Mexico	69%	25%	66%
Singapore	68%	24%	64%
Peru	66%	27%	65%
Malaysia	64%	23%	71%
India	63%	20%	63%
South Africa	63%	27%	57%
Türkiye	61%	28%	63%
Colombia	55%	40%	54%
Brazil	53%	35%	63%
Chile	51%	37%	54%
Argentina	48%	39%	45%
Japan	43%	41%	36%
Spain	43%	42%	41%
Ireland	42%	47%	31%
Poland	41%	40%	46%
Italy	40%	49%	44%
Australia	40%	46%	40%
Germany	39%	47%	33%
Switzerland	38%	53%	N/A
Great Britain	38%	46%	34%
United States	37%	45%	34%
Hungary	37%	52%	36%
New Zealand	37%	49%	35%
Canada	37%	46%	34%
France	35%	54%	32%
Belgium	34%	49%	31%
Netherlands	32%	49%	36%
Sweden	31%	55%	31%

Irish people are less likely to agree compared to the global average that products and services using artificial intelligence have profoundly changed my daily life in the past 3-5 years

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

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**



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

Irish people are less likely to agree compared to the global average that products and services using artificial intelligence profoundly changed their daily life in the NEXT 3-5 years

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?

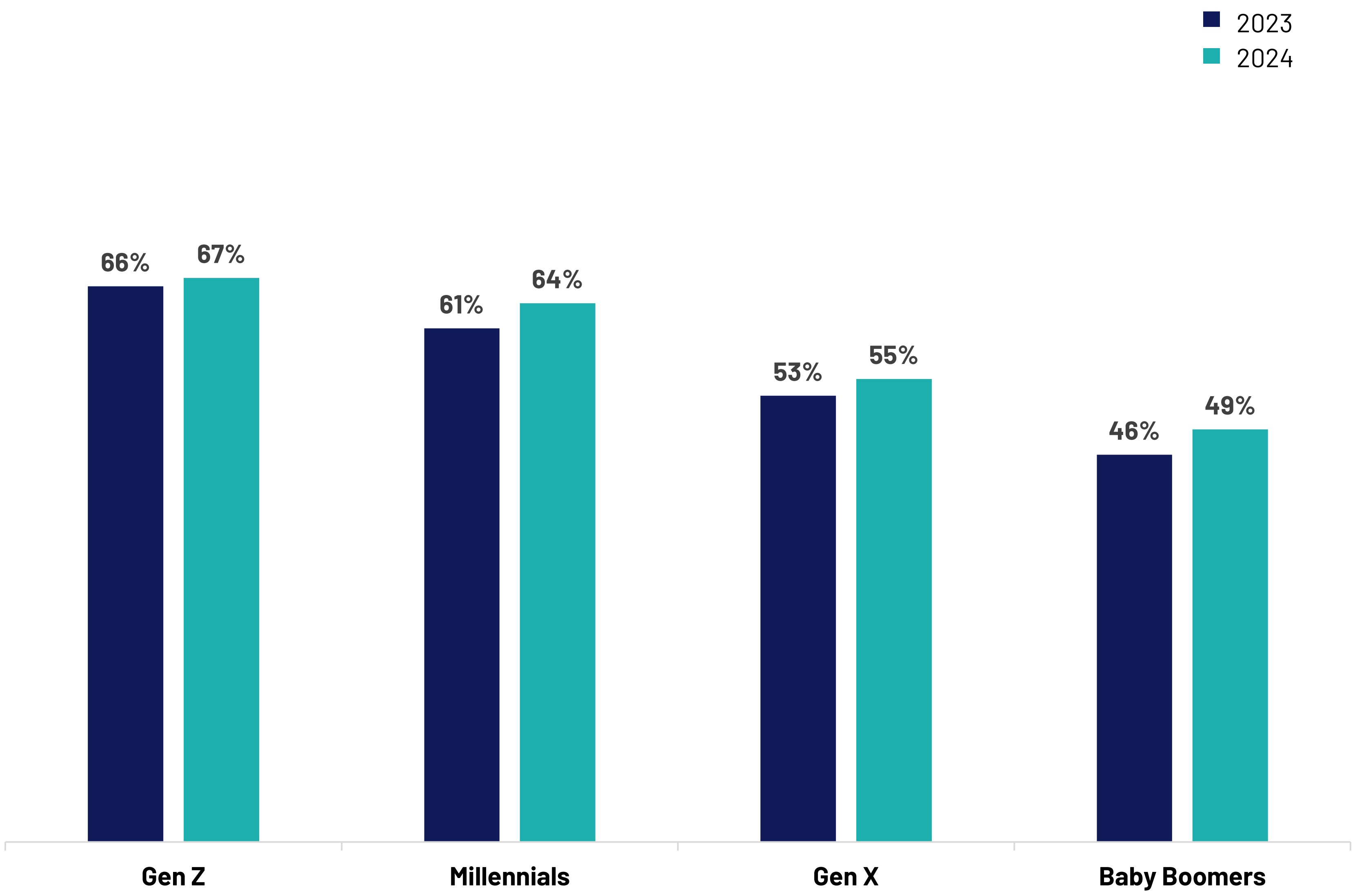
Country	Very likely	Somewhat likely	Not very likely	Not likely at all	Agree / 23
Global Country Average	21%	39%	22%	10%	57%
Indonesia	44%	43%	10%	1%	87%
Thailand	28%	53%	14%	2%	78%
China	22%	58%	13%	2%	N/A
Peru	29%	49%	13%	4%	68%
Malaysia	27%	52%	11%	3%	81%
South Africa	44%	34%	12%	6%	71%
Colombia	29%	43%	20%	4%	69%
Singapore	19%	52%	19%	5%	67%
Mexico	30%	40%	17%	5%	63%
Brazil	37%	30%	15%	10%	73%
India	26%	39%	6%	8%	62%
Argentina	29%	34%	18%	9%	59%
Chile	24%	39%	22%	6%	60%
Türkiye	21%	42%	23%	9%	63%
Spain	14%	43%	23%	10%	57%
New Zealand	21%	34%	25%	14%	47%
Switzerland	14%	40%	25%	17%	N/A
France	17%	37%	30%	10%	50%
United States	17%	35%	24%	13%	48%
Australia	16%	34%	26%	15%	52%
South Korea	10%	41%	30%	11%	50%
Great Britain	17%	32%	25%	17%	49%
Ireland	21%	29%	29%	19%	47%
Belgium	16%	32%	24%	17%	40%
Italy	9%	39%	32%	13%	53%
Sweden	13%	33%	32%	15%	35%
Canada	15%	31%	26%	17%	43%
Hungary	15%	30%	31%	14%	38%
Poland	12%	32%	36%	9%	52%
Germany	13%	30%	29%	17%	35%
Japan	10%	33%	25%	14%	41%
Netherlands	8%	30%	32%	22%	42%

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

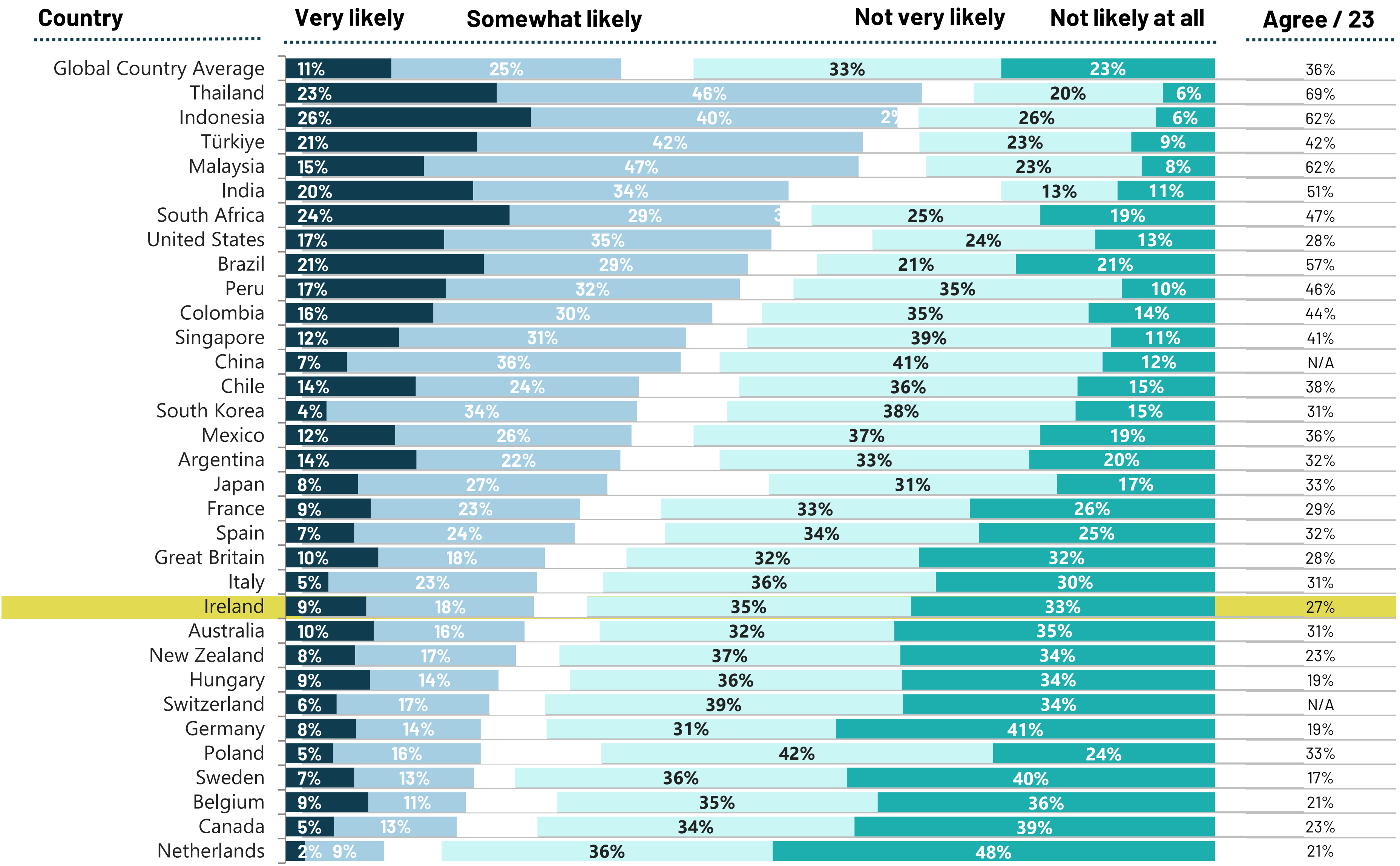
About half of Irish people believe that AI will change how they do their job in the next five years, below the 60% global average.

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

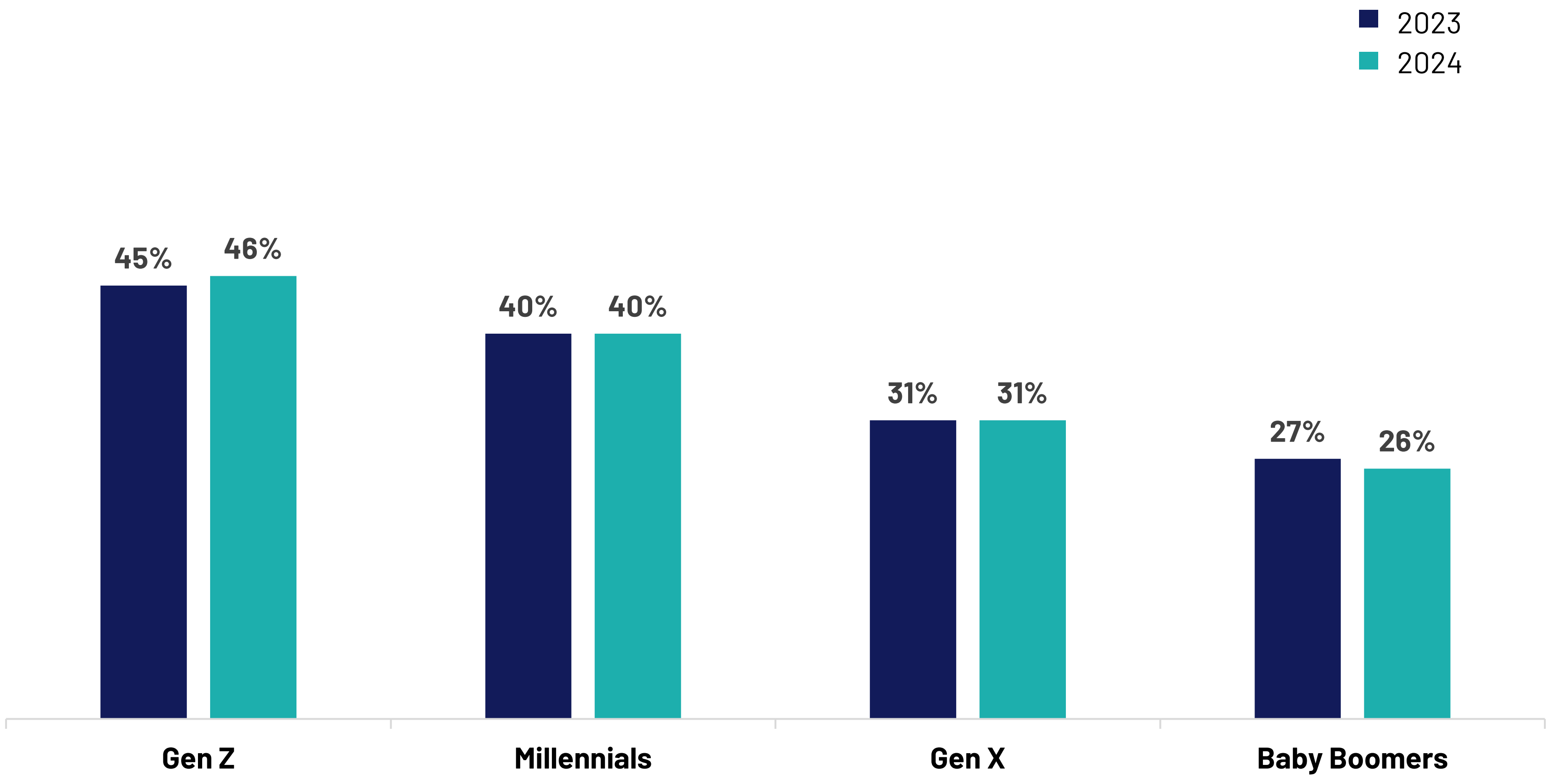


How likely, if at all, do you think it is that AI will replace your current job in the next 5 years?



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

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



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

ONLINE BEHAVIOUR CONTINUES TO GROW IN STREAMING & FINANCE

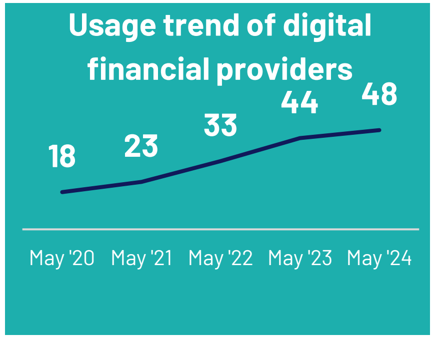
Phenomenal growth in use of digital finance providers – half the population now use

48%

of Pop.

(Just over 1.9 Irish people aged 16+) now use digital financial providers in Ireland

(e.g. Revolut, N26, Monzo).



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

Region

Dublin	Outside Dublin
55%	45%
(52%)	(40%)

Social class

ABC1	C2DE
59%	37%
(60%)	(30%)

Generations

Gen Z	64%	(60%)
Millennials	60%	(62%)
Gen X	55%	(41%)
Baby Boomers	22%	(18%)
Silent Gen	-	(13%)

()=2023 data

= Significantly higher = Significantly lower

Ipsos B&A

49%

(44% in 2023)

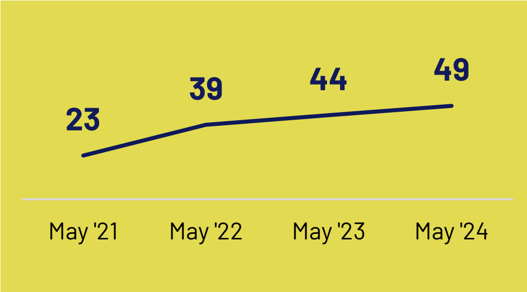
of all adults made a contactless mobile payment in store using a digital wallet (e.g., using a mobile phone, a smartwatch, etc., rather than using a physical bank card)

New payment methods are continuing to grow, particularly among younger generations and the middle class – location once again becoming less of a factor

Base: all Adults 16+ - 1,000

Ever do nowadays

Who is ever using?	
Under 50	64%
Over 50	28%
ABC1	59%
C2DE	41%
Dublin	53%
Outside Dublin	48%



7%

(10% in 2023)

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

Engagement with cryptocurrency experiencing some softening compared to 2023. Younger generations and the middle class continue to show higher usage.

Base: all Adults 16+ - 1,000

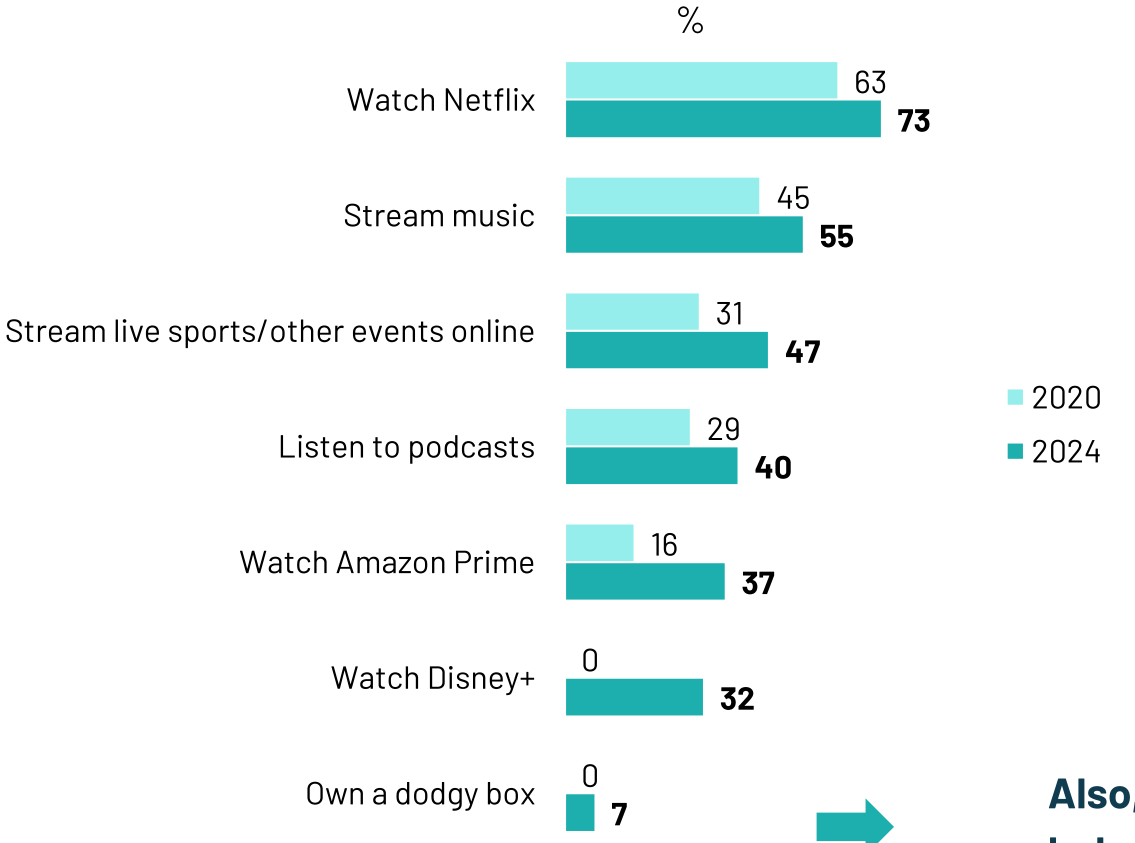
Ever do nowadays

Who is dabbling?	
Under 35	18%
ABC1	11%
C2DE	4%

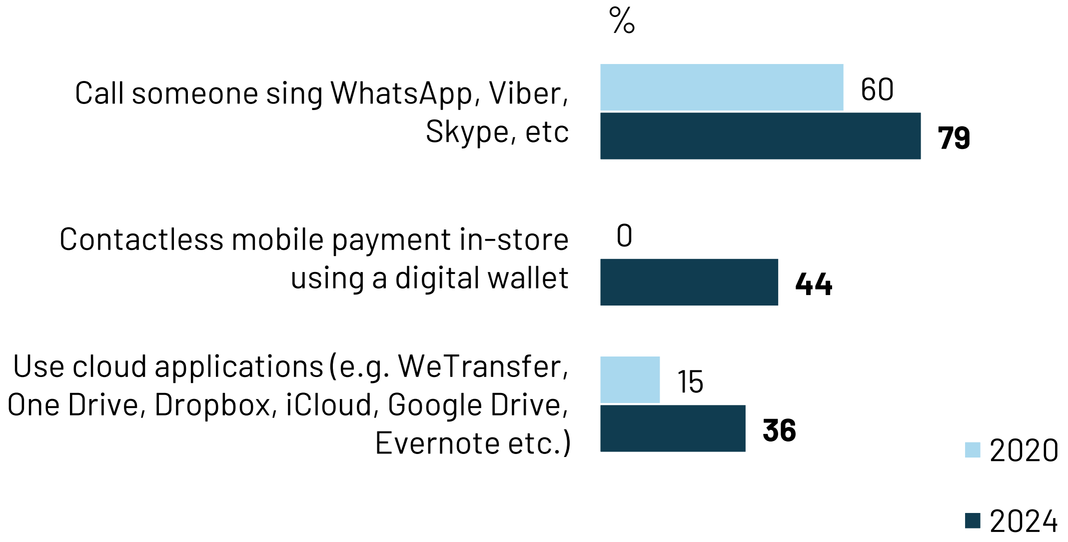
A lot has happened in the last four years: Highlights

Base: All adults 16+ - 1,000

Growing in streaming



Comms, storage and payment behaviour also changing



Also, the 'cute hoor' still emerges as a behavioural Irish trait.

Dodgy box added 2024

Continuous growth in paid and other streaming, however the digital banking space sees the largest growth areas this year

Base: All adults 16+ - 1,000

Those with both Netflix & Amazon Prime = 75% (77%) (so Netflix is dominant with Amazon seen as an add on)

Entertainment

73% Watch Netflix

72% Watch or listen to content on YouTube

55% Stream music, via Spotify, YouTube, etc

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

40% Listen to Podcasts

37% Watch Amazon Prime

37% Watch or stream live sports or other events online

32% Disney Plus

24% *Watch an online streaming service such as Twitch, Mixer, YouTube Gaming

20% Play Games online with others

14% Watch Apple TV

13% Watch/stream movies/shows etc. via sites such as Showbox, Putlocker , etc.

13% Watch Paramount+

7% Own a 'dodgy box'

76% ANY Paid Streaming

Communications

85% Use personal email

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

79% Call someone using WhatsApp, Viber, etc.

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

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

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

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

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

( ) = Brackets relate to 2023

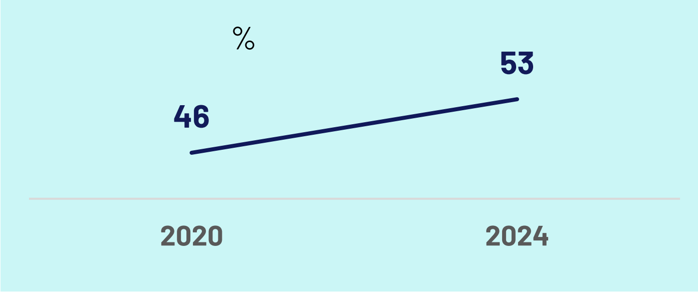
BROADBAND VIEWED AS AN ESSENTIAL UTILITY

Overall, half the population now regard broadband as more important than TV (compared to 46% in 2020). YouTube also increasingly a player in content terms.

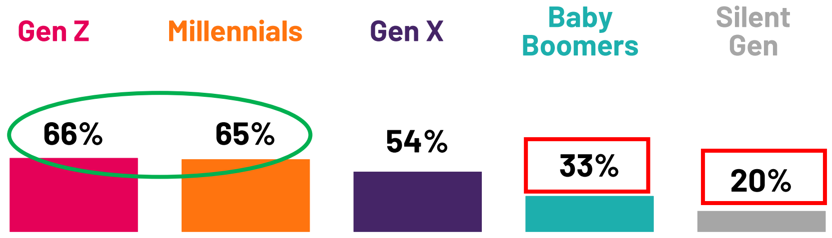
Base: All Adults 16+ - 1,000

Broadband is more important to me than TV

Total Pop.



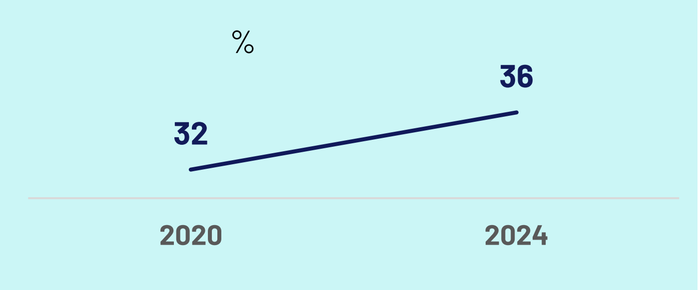
Generations



YouTube

I am watching more content on YouTube than on live TV

Total Pop.



= Significantly higher = Significantly lower

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.

Base: All Adults 16+ - 1,000

	Total Pop.	Social class		Region		
		ABC1	C2DE	Dublin	Other urban	Rural
Broadband is more important to me than TV	57%	**66%**	**50%**	63%	62%	**46%**
I am watching more content on YouTube than on live TV	36%	41%	33%	40%	36%	33%

Driving the growth (Other urban, Rural)

Significantly higher (ABC1 66%) **Significantly lower** (C2DE 50%, Rural 46%)

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

WE'RE (ONLINE) SOCIAL ANIMALS

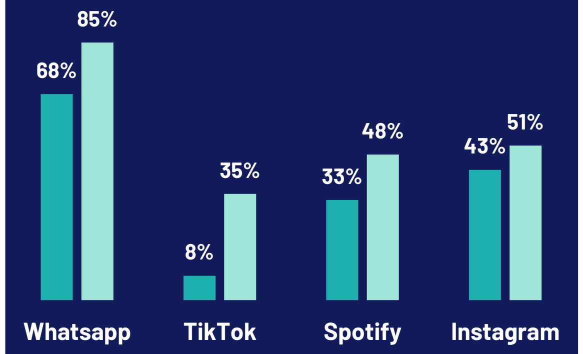
Growth of Tik Tok continues

Base: All Adults 16+ - 1,000

May 23 %		May 2024	Change vs May 2023 %	Change vs 2020 %
78	WhatsApp	85	+7	+17
66	Facebook*	70	+4	+2
55	Facebook Messenger	52	-3	n/a
55	Instagram*	51	-4	+8
45	Spotify	48	+3	+15
32	Snapchat*	29	-3	-2
30	TikTok	35	+5	+27
25	LinkedIn*	25	=	+6
21	X / Twitter*	22	+1	+4
17	Pinterest*	16	-1	=
16	Viber/ Viber Messenger	13	-3	-17
9	Sound Cloud	13	+4	+3
8	Reddit	9	+1	+6
5	Tinder	6	+1	+1
4	Bumble	2	-2	=
3	Plenty Of Fish	2	-1	=
3	Tumblr	2	-1	=
3	Twitch	4	+1	n/a
2	Signal	2	=	n/a
2	Be Real	3	+1	n/a
1	Hinge	1	=	n/a

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

The big movers in the last four years are Tik Tok (+27), WhatsApp (+17), Spotify (+15) and Instagram (+8).



Facebook messenger added May 2021 – impacting Facebook comparison results
*Signal & Twitch also added May 2021 * = Social media*

= Significantly higher = Significantly lower

TikTok

76%

GenZ are the TikTok population

Total population 35%

Generations	
Gen Z	76%
Millennials	40%
Gen X	25%
Baby Boomers	9%
Silent Gen	-

○ = Significantly higher □ = Significantly lower

Ipsos B&A

16-24's

Growth in Tik Tok, LinkedIn and Pinterest.

89%

85%

79%

77%

77%

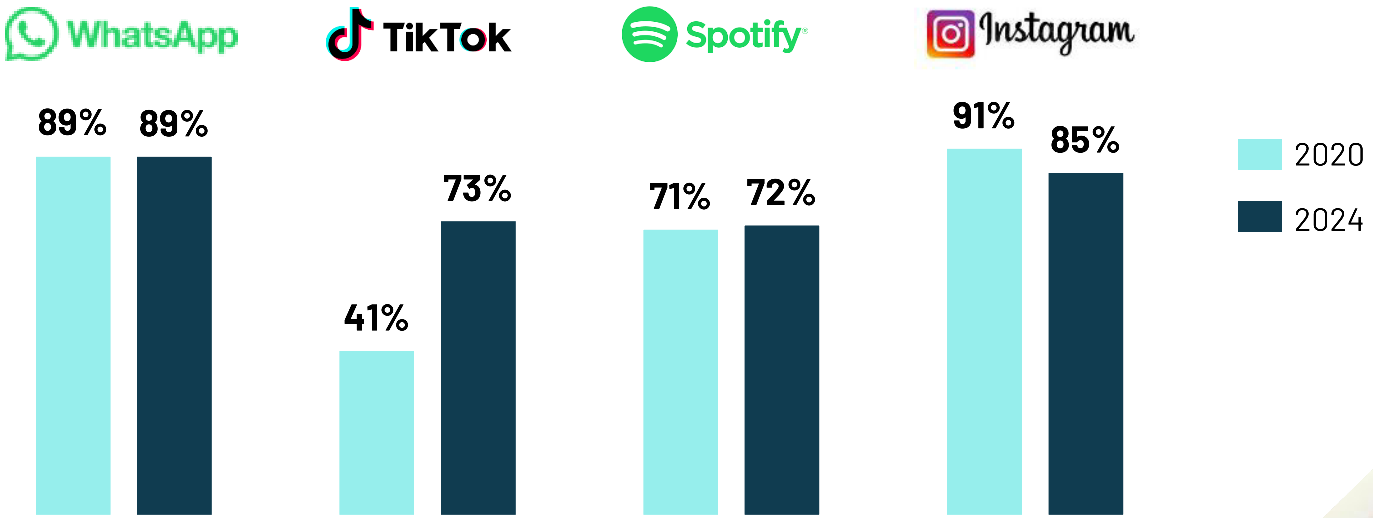
72%

66%

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

Instagram and Tik Tok most popular social media platform among 16-24-year-olds

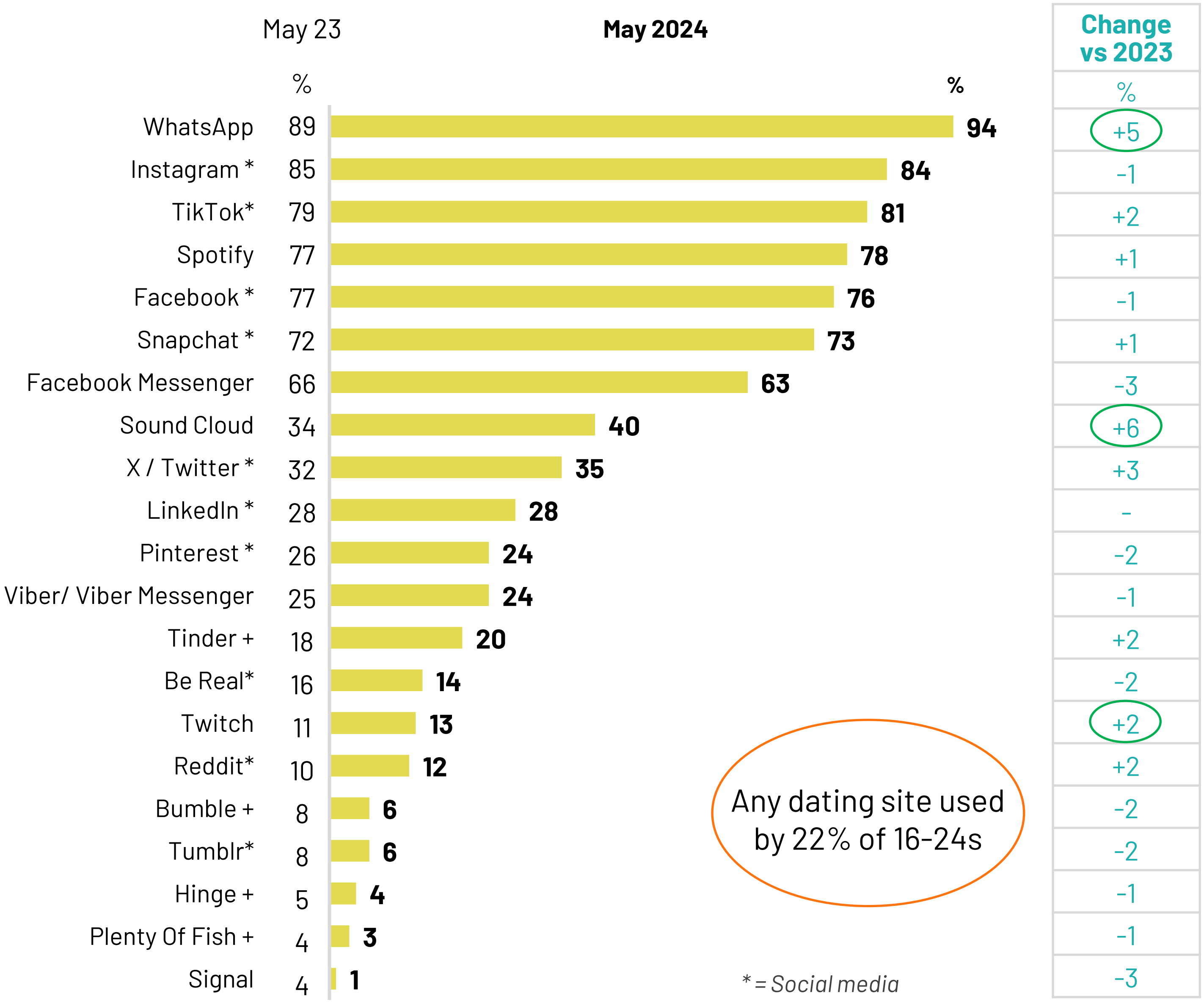
Base: All 16-24 yrs - 106



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

Instagram and Tik Tok most popular social media platforms among 16-24 year-olds

Base: All 16-24 yrs - 106



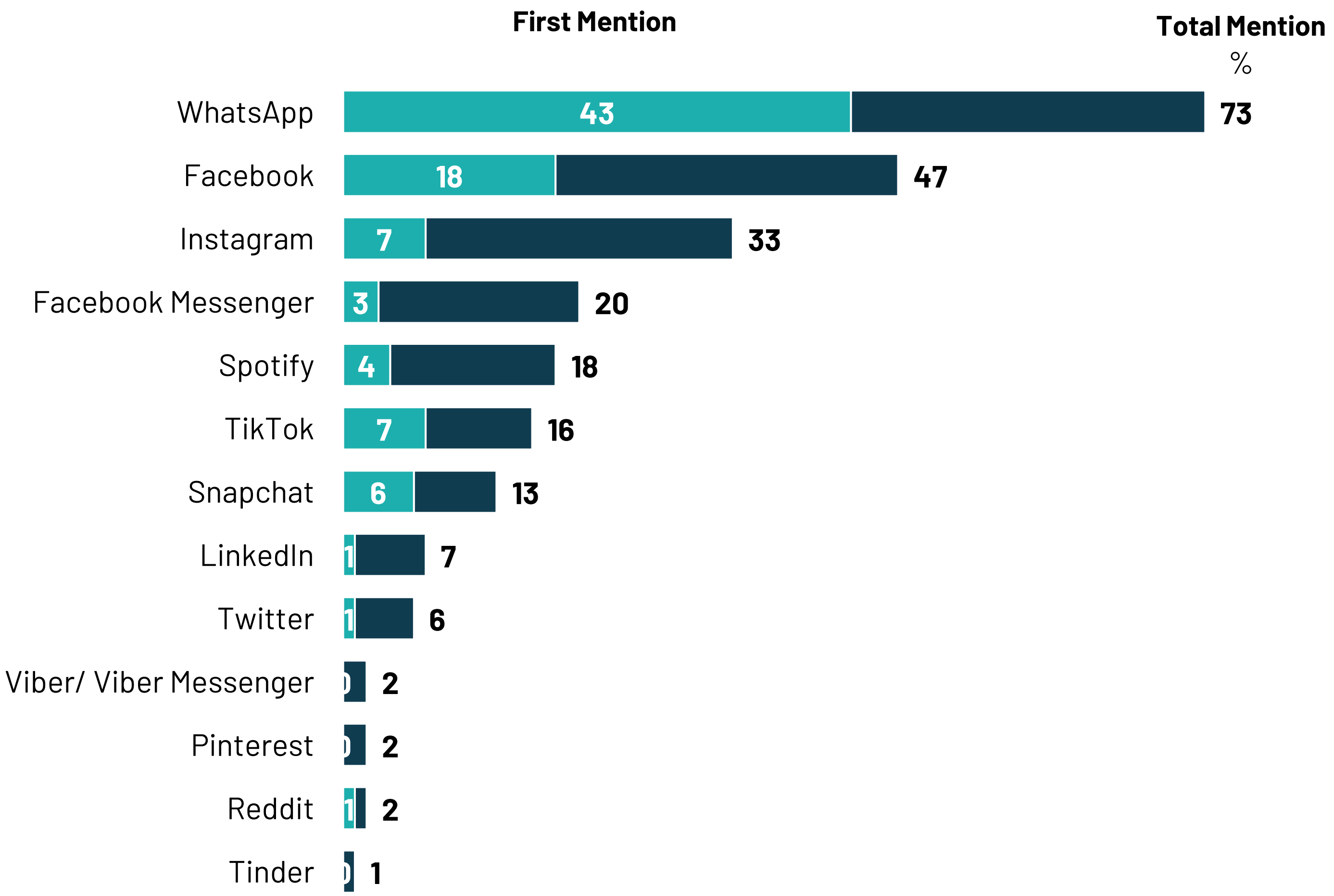
** = Social media*
+ = Dating Sites

BeReal & Hinge added May 2023

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

WhatsApp shows highest usage. Only Gen Z have a different app as their most used. Millennials and Gen Z show the widest variance in most used apps

Base: All adults 16+ - 1,000



Generations

	Top Used App (excluding WhatsApp)	
Gen Z	Instagram	53%
Millennials	Facebook	50%
Gen X	Facebook	63%
Baby Boomers	Facebook	44%
Silent Gen	Facebook	19%

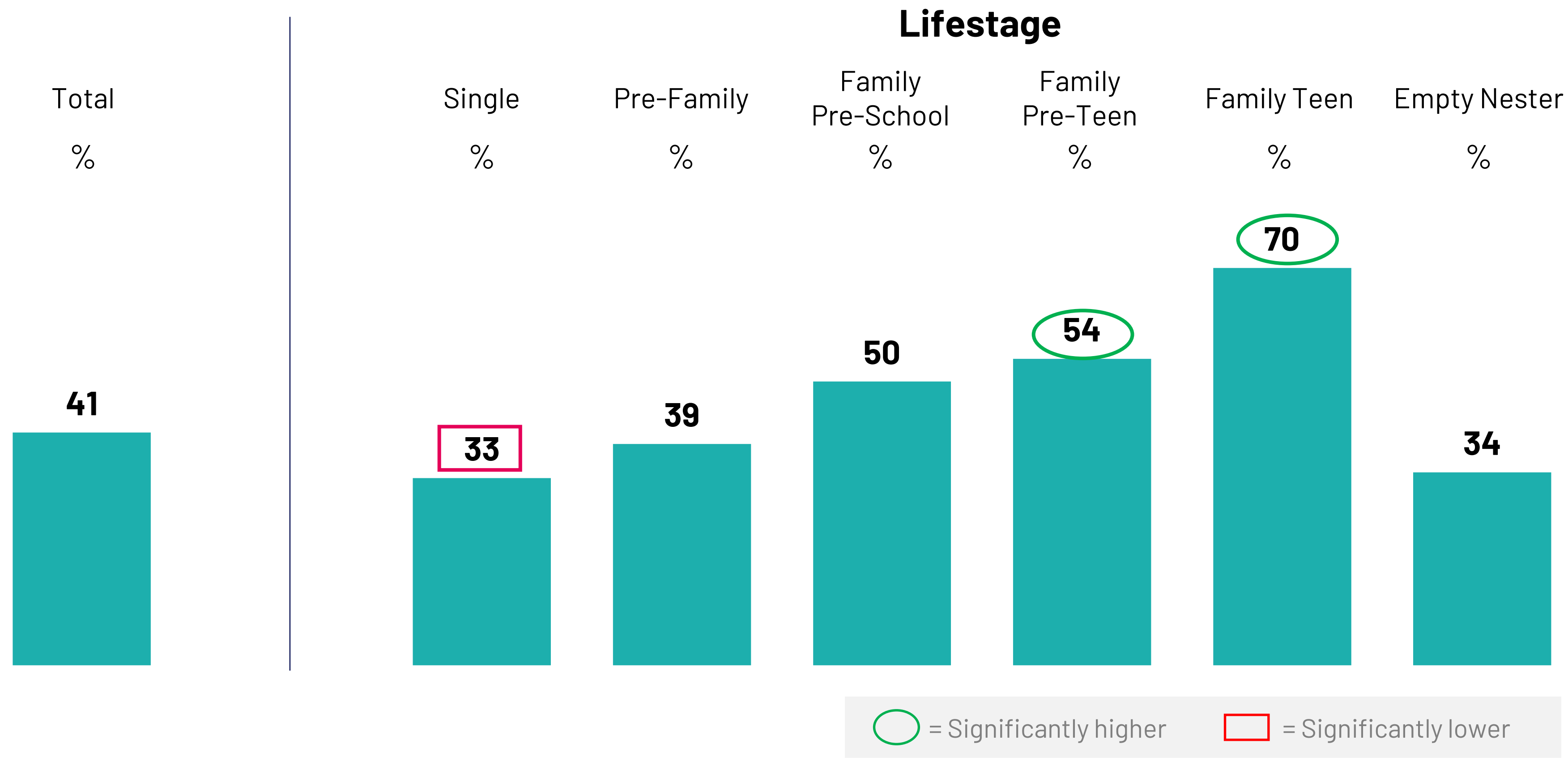
= Significantly higher = Significantly lower

Q.5a And which one do you mostly use?

IMPACT OF OUR ONLINE LIVES

Those with pre-teens and teens in the home show higher agreement that tech is having a negative impact on family life in the home

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)

41% 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	34%
Millennials	52%
Gen X	48%
Baby Boomers	31%
Silent Gen	21%

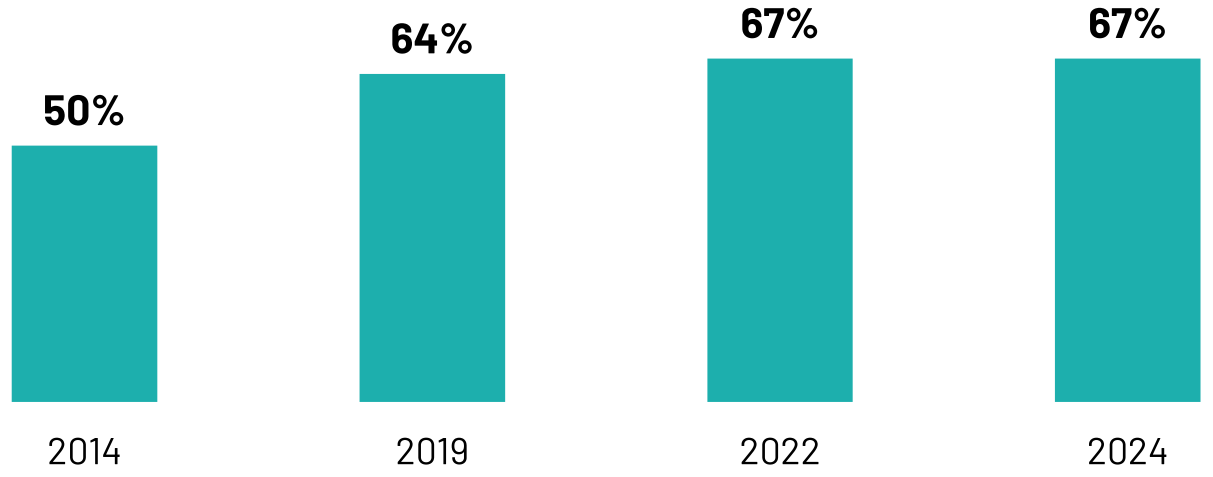
Gen Z likely agreeing less as tech in the home has been a factor for most of their lives.

= Significantly higher   = Significantly lower

Ipsos B&A

2 in 3

feel we have lost the art of conversation



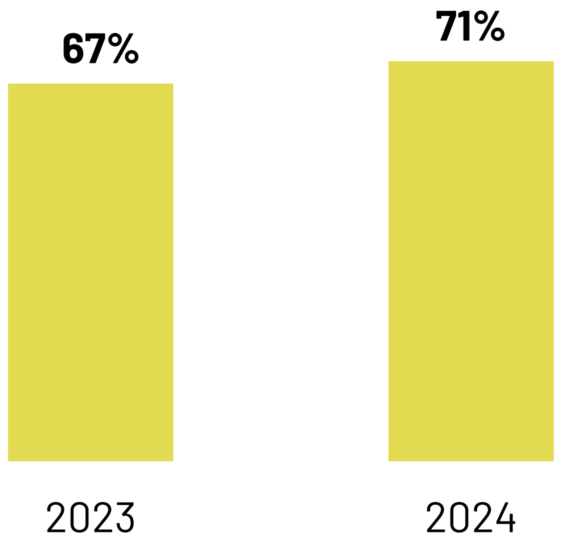
Age

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

The 50+ age group is driving the increase – those under 35 are increasingly disagreeing, with this more likely to be their norm.

= Significantly higher = Significantly lower

Increased worry that children's ability to communicate in person has been stunted due to technology (71% now agree)



Age

	2024
	%
16-24	53
25-34	65
35-49	72
50-64	83
65+	73

Lifestage

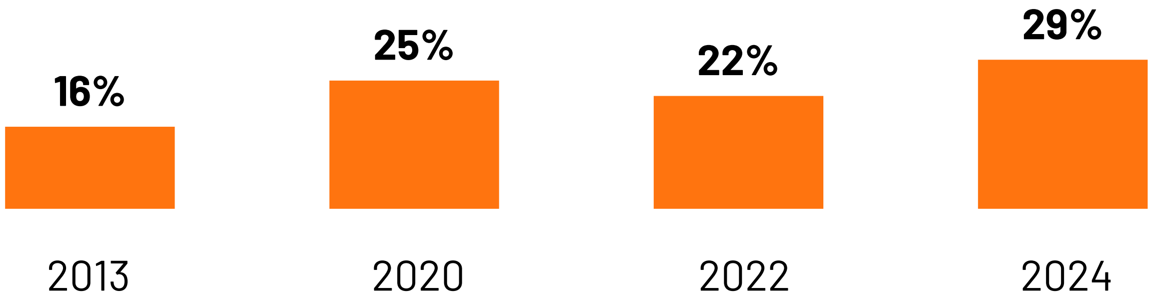
	2024
	%
Family Pre-teen	73
Family Teen	82

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
	%	%	%
16-24	39	39	32
25-34	34	33	48
35-49	26	21	34
50-64	18	14	25
65+	9	10	8

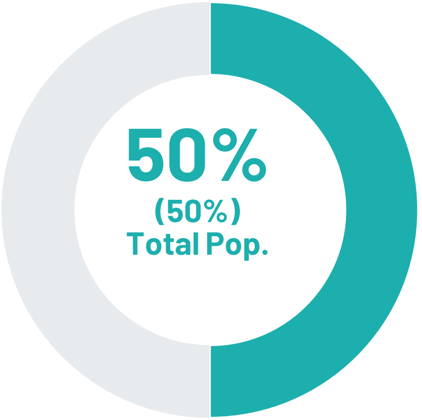
Those under 50 are struggling to switch off, with a significant increase from 2022.

= Significantly higher = Significantly lower

A huge proportion of us are checking social media/emails first thing in the morning and last thing at night – this is higher among those WFH

Base: All Adults 16+ who use SM (895)

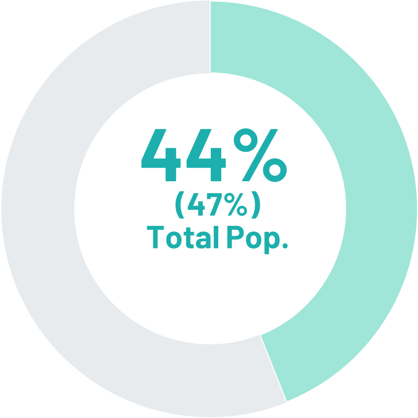
The first thing I do in the morning is check emails, text messages, or social media sites



Work from Home

ANY Yes	No	ANY Regular WFH
59%	48%	**61%**

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



Work from Home

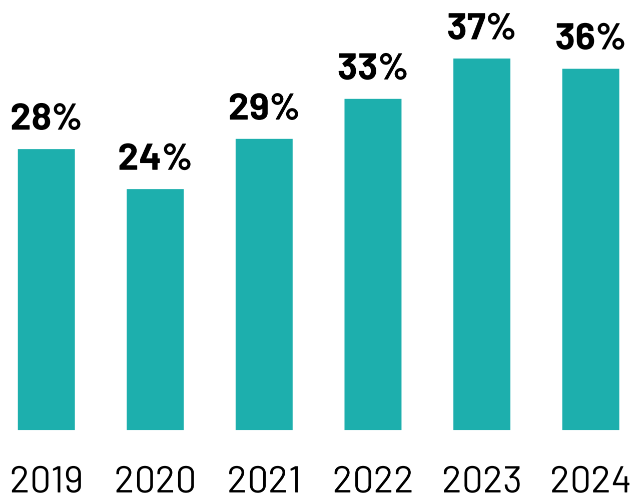
ANY Yes	No	ANY Regular WFH
57%	40%	**57%**

Significantly higher Significantly lower

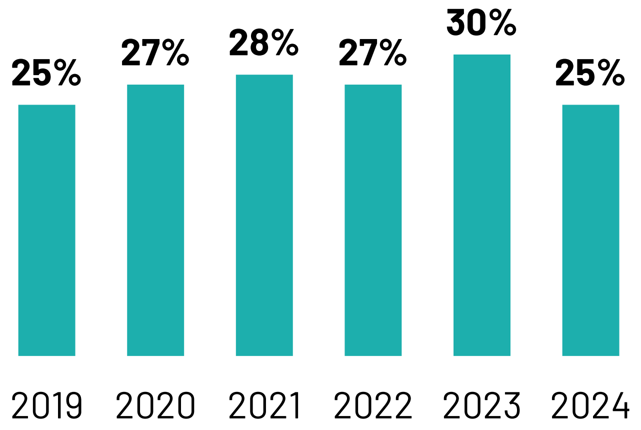
High levels remain for people checking social media/emails when having difficulty sleeping and work emails when on holidays. Millennials showing least disconnect when considering both metrics together

Base: All Adults 16+ (1000)

Check social media or emails when having difficulty sleeping



Check work emails when on holidays



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

(38% amongst ABC1)

Generations

	Check social media or emails when having difficulty sleeping	Check work emails when on holidays
Gen Z	58%	19%
Millennials	45%	37%
Gen X	36%	30%
Baby Boomers	13%	15%
Silent Gen	0%	1%

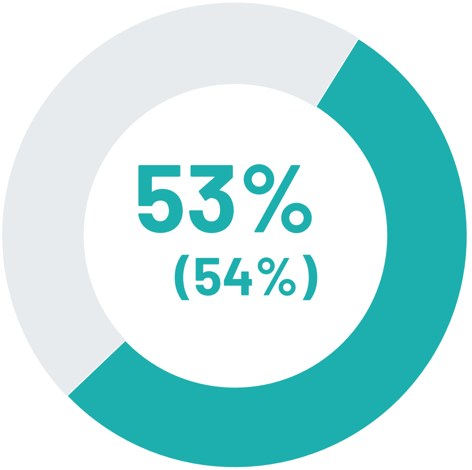
= Significantly higher   = Significantly lower

() – 2024 Data

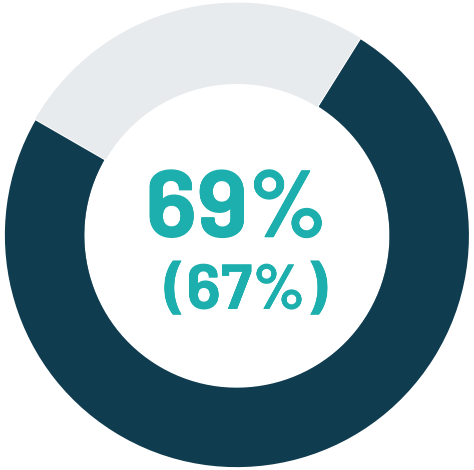
INCREASED CONCERN SURROUNDING DATA PRIVACY

2 in 3 are concerned about how their data is used by organisations nowadays

Worry About Data Privacy Online



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



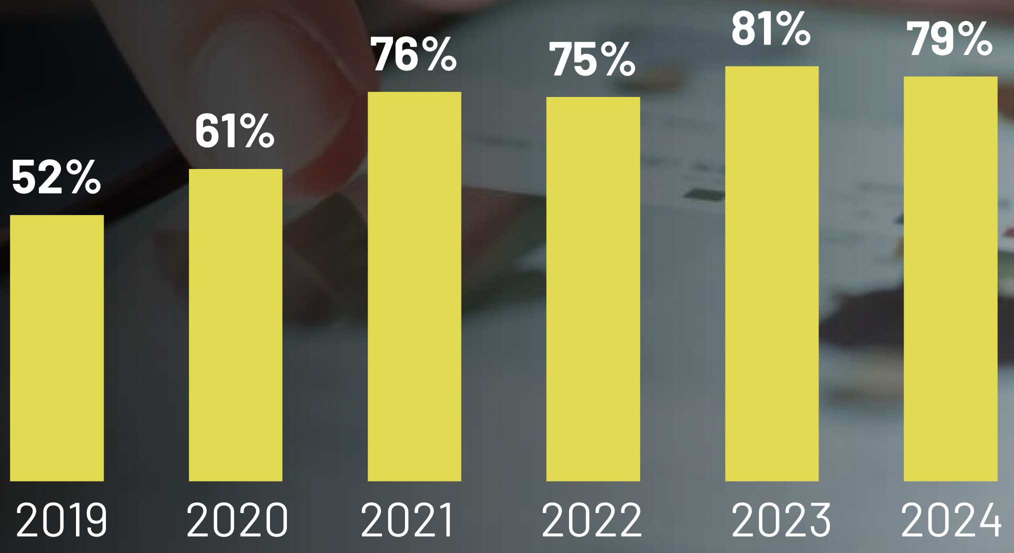
()=2023 data

Generations

	Worry About Data Privacy Online	I am concerned in general nowadays regarding how my data is used by organisations
Gen Z	48%	68%
Millennials	61%	70%
Gen X	63%	78%
Baby Boomers	46%	63%
Silent Gen	11%	46%

= Significantly higher = Significantly lower

ONLINE PURCHASING & ACTIVITIES



4 in 5 (79%) 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

4 in 5 purchase online. Growth seen in clothes/shoes and grocery sales online.

Base: All purchasing good/services online @Q8 - 673

		( ) 2023	[ ] 2019
Flights	88%	(86%)	[83%]
Hotel bookings	84%	(85%)	[80%]
Clothes/ shoes	84% ↑	(78%)	[76%]
Electric goods	50%	(44%)	[48%]
Car hire	36%	(38%)	[38%]
Music/film downloads/ CD/DVDs/ TV shows	37%	(36%)	[36%]
Magazine/ Book	37%	(36%)	[32%]
Computer games	28%	(28%)	[27%]
Groceries	26% ↑	(20%)	[10%]
Pharm drugs/ medicines	12%	(16%)	[10%]

Equates to 20% of the total population (Groceries)

BUY

( ) = 2023
[ ] = 2019

79%
(81%)
purchase online

Online purchases Generations

Gen Z	90%	(93%)
Millennials	93%	(96%)
Gen X	89%	(86%)
Baby Boomers	56%	(58%)
Silent Gen	15%	(29%)

◯ = Significantly higher ☐ = Significantly lower

Q.10 Do you buy products or services online nowadays from any of the following categories?

20%

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

(Higher amongst middle-class Dubliners)

Food delivery apps (e.g. Deliveroo/Just Eat) used by half of Gen Z, while 3 in 5 of them research on mobiles in stores.

Base: All adults 16+ - 1,000

	2023 %	%	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	73	73%	86	83	83	51	8
Research products on your mobile phone when in a store	50	46%	62	64	42	21	1
Use food apps, such as Deliveroo or Just eat, for home delivery	36	30%	48	39	28	10	2
Use Apps to help meditate/relax/disconnect from the world	24	18%	20	24	23	9	-
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.	22	18%	20	27	19	9	-
Make Tik Tok videos	13	10%	27	12	3	2	-

Gen Z and Millennials driving usage of these online services,.

Q.8 Which, if any of the following do you do nowadays?

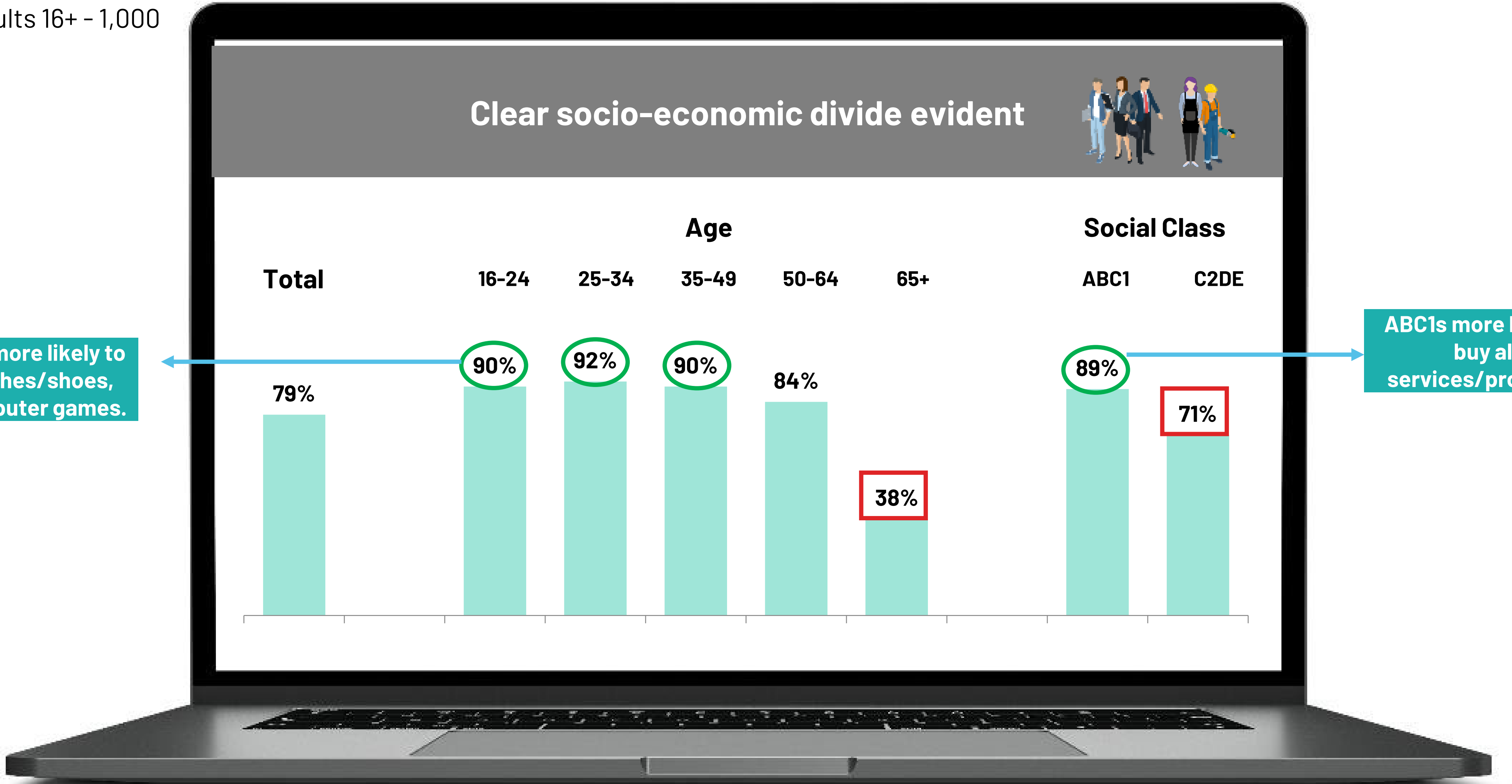
Significantly higher   Significantly lower

Ipsos B&A

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

Base: All Adults 16+ - 1,000

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



ABC1s more likely to buy all services/products;

Q.10 Do you buy products or services online nowadays from any of the following categories?

= Significantly higher = Significantly lower

Significantly higher Significantly lower

What we are buying online x Generation

Base: All Adults 1,000

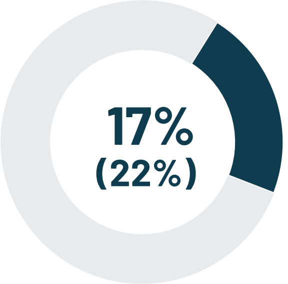
	Total	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
UNWTD	*1000*	*163*	*252*	*220*	*312*	*53*
	%	%	%	%	%	%
Flights	68	69	84	79	48	8
Clothes / shoes	63	78	76	74	34	7
Hotel Bookings	62	66	76	71	45	7
Electric goods (including mobile phones)	35	45	45	45	12	1
Music/film downloads/CD/DVDs/TV shows	26	39	34	28	9	1
Books/Magazines	26	32	31	31	13	2
Car Hire Bookings	25	15	36	33	20	1
Computer Games	21	40	25	19	4	1
Groceries	20	19	30	26	8	3
Pharmaceutical drugs/medicines	10	10	12	12	5	3

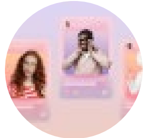
Millennials driving online purchasing, with Gen Z and Gen X also contributing.

Q.10 Do you buy products or services online nowadays from any of the following categories?

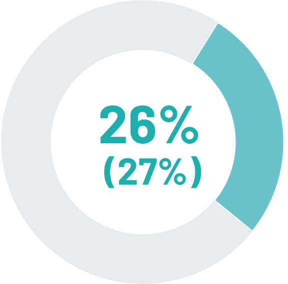
While following celebs/YouTubers/ influencers online, remains high, purchasing based on recommendations has declined. The latter is likely a result of the desire for 'Virtual Authenticity'

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

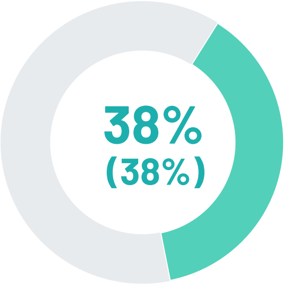




I follow a lot of celebrities, youtubers or "influencers"



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



()=2023 data

People, especially Gen Z are increasingly avoiding 'company speak' and seeking an 'unvarnished reality'.

Generations

	Buy products or services based on recommendations from 'Influencers'/ Celebrity endorsements	I follow a lot of celebrities, youtubers or "influencers"	I follow brands on social media (i.e. on Facebook, Instagram, etc)
Gen Z	28%	55%	61%
Millennials	28%	32%	52%
Gen X	13%	15%	35%
Baby Boomers	3%	7%	13%
Silent Gen	0%	2%	2%

= Significantly higher = Significantly lower

IN SUMMARY 2024

Key Themes

Ipsos B&A

1. Increasingly Connected Irish Consumer

- 'Better' smart TVs, wearables, e-readers, and connected homes.
- 9 connected devices on average (12 for teen family households)
- Middle class skew.

2. Older cohorts more digitally active

- 54% of 65+ year old online daily.
- But less into gadgets.

3. Phenomenal Streaming Growth since 2020

- 73% watch Netflix .
- 40% listen to Podcasts.
- 37% watch Amazon Prime.

4. BB more important than TV for half the population (53%)

- Indicates streaming growth, but also the important role that TV still has.
- Platforms such as YouTube are players, with 56% GenZ watching more content on YouTube than on live TV.

5. Digital Financial Revolution

- Half (48%) now use digital finance providers (e.g. Revolut, N26, Monzo etc.)
- 49% use contactless payments

6. Desire for Virtual Authenticity

- Growth in TikTok (35%), WhatsApp (85%), Instagram (51%).
- A desire for unvarnished reality, as people avoid 'company speak'.

7. High AI nervousness in Ireland

- 67% nervous about products and services that use AI, compared to 40% who say AI makes them excited. Globally Ireland has the highest level of nervousness of products and services using AI (67% Ireland, 50% global)

8. Less Trust & AI

- Ireland has less trust than the global average that that companies that use artificial intelligence will protect their personal data (42% Ireland, 47% global)
- Ireland is the only country where people are more likely to trust people to discriminate less than AI.

9. Acute level of concern about Tech impact on Society

- Not surprisingly given our tech gearing, 70% of family teen households feel tech has a negative impact on family life in the home.
- 29% find it hard to switch off.

In Summary

Finance:

Phenomenal growth in the use of digital financial providers (e.g. Revolut, N26, Monzo, etc.) since 2020 (18%) with half the population (48%) now using in some form.

- Driven by middle class Dubliners but growing outside of these fractural cohorts.

Also, half the population (49%) now use contactless mobile payment in store via digital wallets (up from 39% in 2022).

- 2 in 3 (64%) of those under 50 use, compared to 28% of those aged 50+ years.

Streaming growth in the last 4 years (since 2020):

- 3 in 4 (73%) of us watch Netflix compared to 63%in 2020.
- 37% watch Amazon Prime
- 32% watch Disney+

Podcasts have grown with 40% of the population now listening (up from 29%)

In terms of people's perception of BB being more important than TV, 53% now agree, compared to 46% in 2020, indicating the growth in streaming, but also the important role that TV still has.

Undoubtedly, platforms such as YouTube are players in content terms with GenZ, with just over half (56%) watching more content on YouTube than on live TV.

In Summary

Authentic Comms Growth:

From the Ipsos B&A Sign of the Times Report we saw that people, especially Gen Z, are increasingly avoiding 'company speak' and seeking an unvarnished reality. Hence, the growth of platforms such as TikTok, but also, the decline in purchases based on influencer/celeb endorsements. A clear desire for 'virtual authenticity' is evident.

Top 3 SM platforms

16+ years	**16-24 years**
1. Facebook **70%**	1. Instagram **84%**
2. Instagram **51%**	2. TikTok **81%**
3. TikTok **35%**	3. Facebook **76%**

Big movers over the last 4 years (since 2020) have been:

- TikTok 35% (+27 percentage points)
- WhatsApp 35% (+17 percentage points)
- Spotify 48% (+15 percentage points)
- Instagram 51% (+8 percentage points)

Still 70% of the population use Meta Facebook to any extent.

X/Twitter used by 22% pf the population (17% down from 22%)

In Summary

Tech Concerns Still Evident:

While there is an appreciation that tech is here to stay and we need to make the best use of it, 41% feel technology is having a negative impact on family life in their home (e.g. People spending too much time on different devices etc.)

- 70% agreement amongst teen households.

2 in 3 (67%) over the last number of years feel we have lost the art of conversation – Interestingly this has grown amongst 16–24-year-olds since 2020 (47% to 58% now agree).

In line with the above we also see an increase in worry about children's ability to communicate has been stunted due to technology (71% agree, up from 67% in 2023).

Not surprisingly about 1 in 3 (29%) of us find it hard to switch off (from thinking about work/school/college in spare time in evenings/weekends) – risen to 48% for those ages 25-34 years.

Online Purchasing & Behaviour:

4 in 5 of the population now purchase online with the top categories; flights (88%), hotel bookings (84%) clothes/shoes (84%).

We are seeing a growth in purchasing of clothes/shoes and groceries online

Food delivery apps (e.g. Deliveroo, JustEat) used by half of Gen Z, while 3 in 5 of them research on mobiles/in stores.

Digital engagement continues: 2 in 5 (38%) still follow brands on social media and 1 in 4 (26%) follow a lot of celebs/youtubers or influencers. However, 'influencers'/celeb endorsements are waving (17% from 22%).

In Summary
Delving into AI

Nervousness higher in Ireland than in all other countries surveyed

Sixty-seven per cent say they are nervous about products and services that use AI, compared to 40% who say AI makes them excited. Asia is where excitement is highest while the Anglosphere and Europe are most sceptical.

Knowledge about AI highest among the young

Sixty-seven per cent across 32 countries say they have a good understanding of AI. This rises to 72% for Gen Z and 71% for Millennials 71%, while only 58% of Baby Boomers say they have a good understanding of AI.

However, fewer know what products and services use AI

Forty per cent say they know what products and services use AI. Ireland is one of 13 of the 32 countries surveyed where people are less likely to know what products and services use AI than don't.

In Ireland, AI viewed as more likely to discriminate than humans

Ireland is the only country where people are more likely to trust people to discriminate less than AI. In 29 out of the 32 countries surveyed more people think humans are more likely to discriminate against other people than AI is.

AI expected to make disinformation worse

Forty-six per cent in Ireland think AI will make disinformation on the internet worse, while 24% think it will be better.

People more likely to think AI will make their job better

Thirty-three per cent think AI will make their job better compared to 15% who say it will get worse. However, 36% globally (27% in Ireland) expect AI to replace their job in the coming years, with those with a higher level of education most concerned.

THANK YOU

Ipsos B&A

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