

**Deloitte.**

Digital Consumer Trends  
Ireland

MARCH 2024



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The background features a complex, abstract design. It consists of several overlapping layers of patterns. On the right side, there are dense, wavy lines in shades of blue and green, creating a textured, almost organic appearance. On the left side, there is a lighter, more sparse pattern of small dots and faint lines, suggesting a digital or network-like structure. The overall effect is a blend of natural-looking textures and digital motifs.

# Digital Usage & Online Behaviours



## 1 Digital Usage & Online Behaviours

### Digital Usage

- Most device access has remained relatively stable overall in terms of penetration. After a number of year on consistent penetration, the Smartphone penetration is up 2% to 96% and there has been a significant increase in Wearables increasing from 50% to 67%, along with Smart TVs increasing from 66% to 71% in the past 12 months.
- Apple and Samsung are now the joint most popular brand at 38% each, with Apple been the most popular with the 18-34 year old group.
- The majority of adults (67%) wish they spent less time on devices, up significantly from 51% in the prior year's survey, with the 18-44 year olds being more likely than other age groups to say so.
- Three quarter of respondents use their smartphone as soon as they wake up (up from 59% in the previous year). This is highest among 18-34 year olds (71%) and among women (60% of them say so compared to 43% of men).
- 65% of phone owners look at their phone within 15 minutes or less after waking up (2022: 57%) and 36% (2022: 36%) state that they look at their phone at least 50 times a day.

### Smartphone

- The smartphone is the preferred device for banking, online search, browsing, playing games and shopping, while TV is preferred for long-form content, such as movies.

# Digital Usage & Online Behaviours



## The report

01

### **The Smartphone - the goldilocks device**

Having remained stagnant for the last two years, smartphone access has increased to 96% , up 2 percentage points on last year , the smartphone is truly the device we cannot live without. Access to the smartphone far outreaches access to the “old reliables” such as the laptop at 82% and tablet at 61%. It also has consistently high penetration across all ages, unlike other devices which vary widely. In the current year, the smartphone is now the preferred device for banking, online search, browsing, playing games and shopping, while TV remains the preferred for long-form content, such as movies.

How we use our smartphone has been evolving over the last number of years, as technology advances and the digitalization of our daily lives continues. The sheer fact that 96% of people have one means that our dependence has increased beyond the traditional calls, messaging and emails; we now use it to pay for goods and services in-store through digital wallets, hold tickets or boarding passes while travelling, accessing online accounts through multi-factor authentication and as digital keys to access offices, cars and houses. Currently the EU are looking at rolling out digital driver's licenses.

Based on Deloitte’s TMT Predictions, in 2024, the smartphone is expected to further consolidate its status as the most successful consumer device, as it’s used increasingly to prove identity, utilising built-in fast and secure biometric authentication capabilities. Over the coming years, the volume of transactions authenticated by smartphone may grow to hundreds of trillions of usages per year, with smartphones usurping physical keys and passwords alike. When asked for the first time this year a third of respondents would like to see their smartphones to maintain passport and driver license details instead of the physical documents.

# Digital Usage & Online Behaviours



## The report

02

### Is our usage concerning?

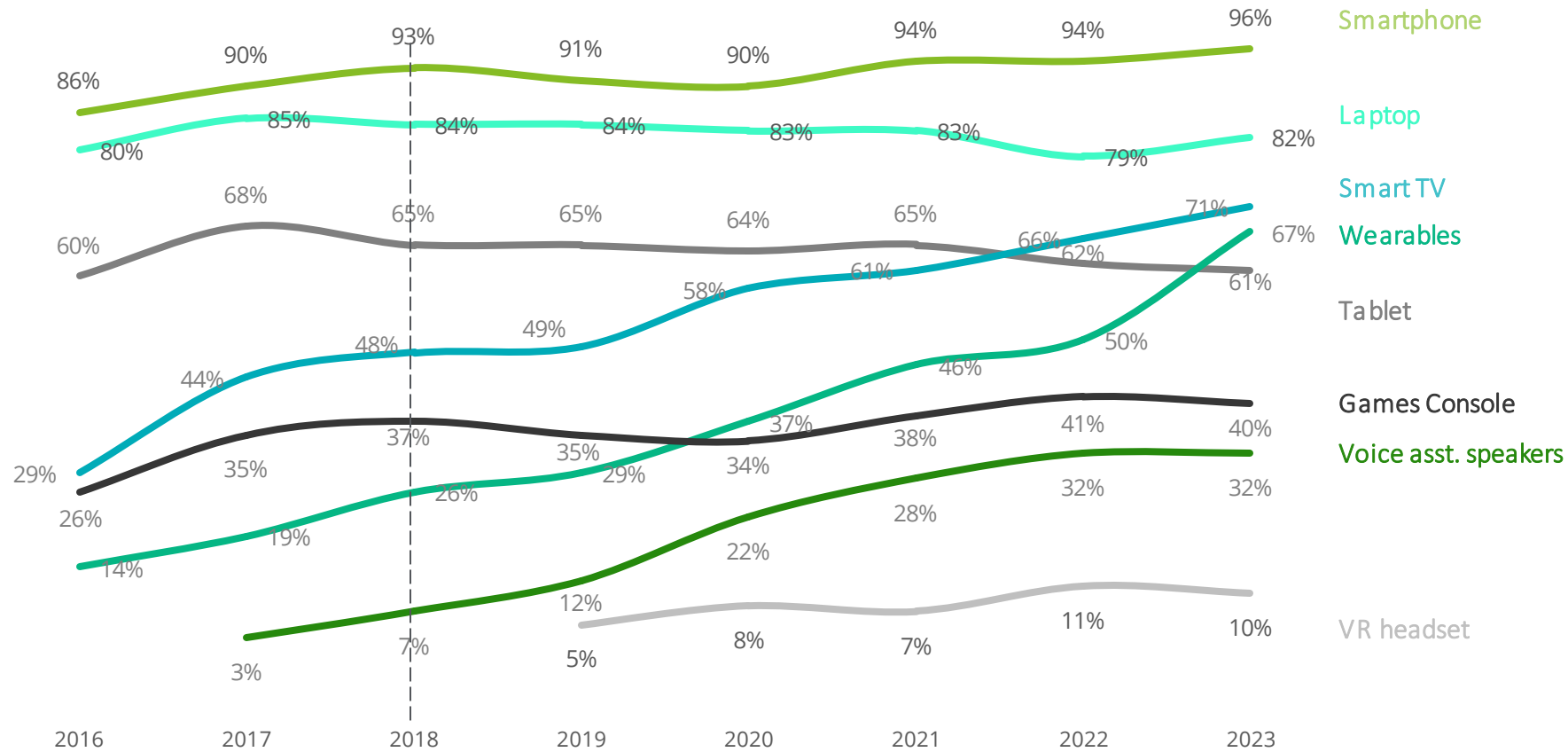
We continue to use our smartphones a lot, with 98% using it every day, up 5 percentage points on 2022, with 99% of women doing so compared to 97% of men. 74% of respondents agree that they use their smartphone as soon as they wake up, up from 59% on prior year and 65% doing so within the first 15 minutes of waking up (57% in 2022) and a third using it during mealtime. Similarly, half of respondents tend to stay awake later than planned because they are using devices into the night, rising to 69% (2022: 62%) and 68% (2022: 64%) of those between 18-24 years old and 25-34 years old, respectively.

36% of respondents check their phone at least 50 times a day, with 16% checking it at least 100 times a day. The smartphone is well and truly ingrained in our daily lives but potentially impact on our social interactions and sleep.

Two-thirds of respondents (67%) however wish they spent less time on devices, rising to 74% for women compared to 54% for men and the 18 to 34 years continue to express the most concern.

# Devices: Access to devices is stable across key metrics. Wearables continue to grow.

Q. Which, if any, of the following devices do you own or have ready access to?

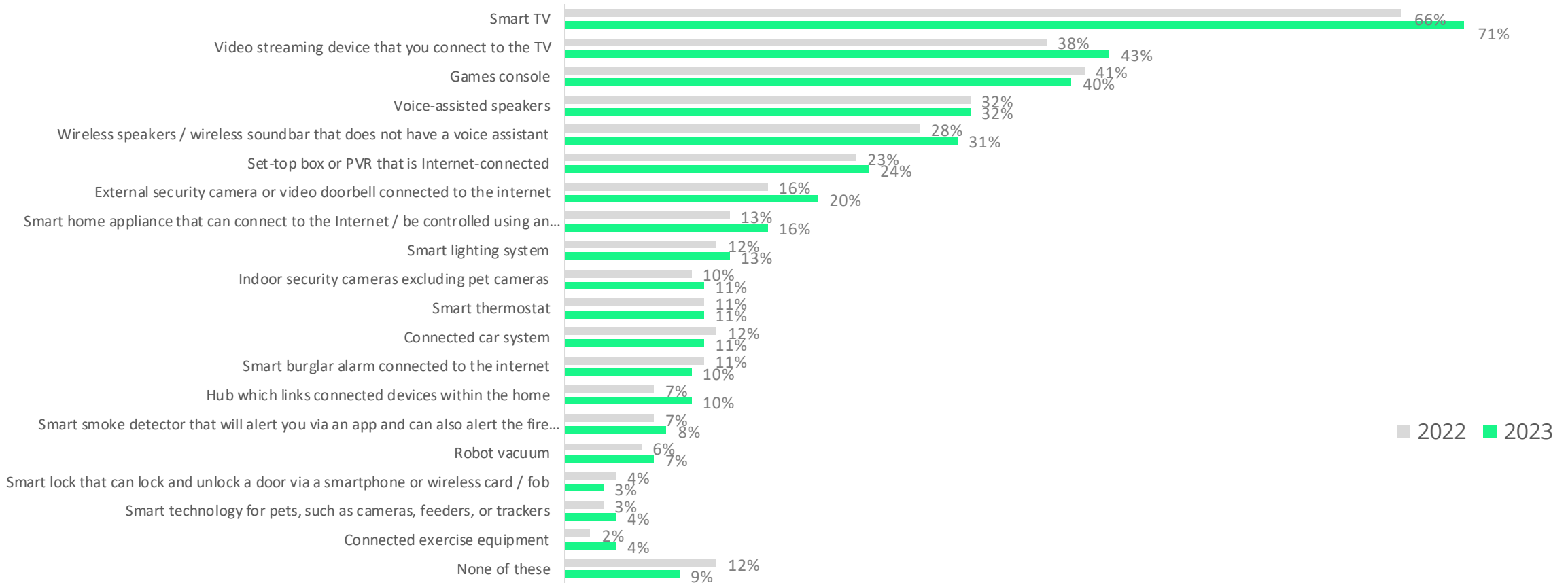


Weighted base: All respondents aged 18-75 in, 2016 (1,002), 2017 (1,036), 2018 (1,000), 2019 (1,000), 2020 (1,000), 2021 (1,000), 2022 (1,001), 2023 (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, 2016-2023

# Smart Entertainment: Overall, access to connected devices is stable year-on-year with Smart TV and video streaming devices growing.

Q. Which, if any, of the following connected devices do you own or have ready access to?

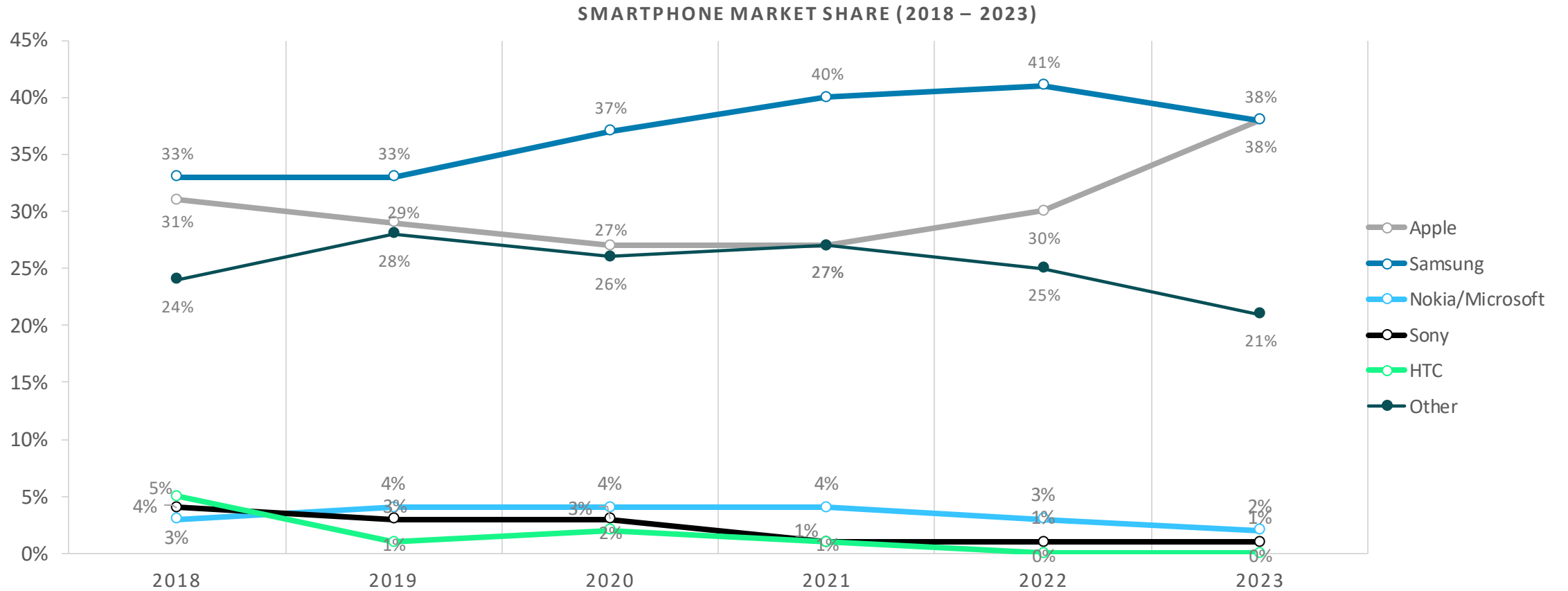


Weighted base: All respondents aged 18-75 in 2022 (1,001), 2023 (1,000)  
 Source: Deloitte Digital Consumer Trends, Ireland, August 2022, September 2023  
 Digital Consumer Trends 2023 - Ireland



# Smartphone Market Share: Samsung and Apple continue to lead the market.

Q. Thinking about your main phone, what is the brand of your current handset?

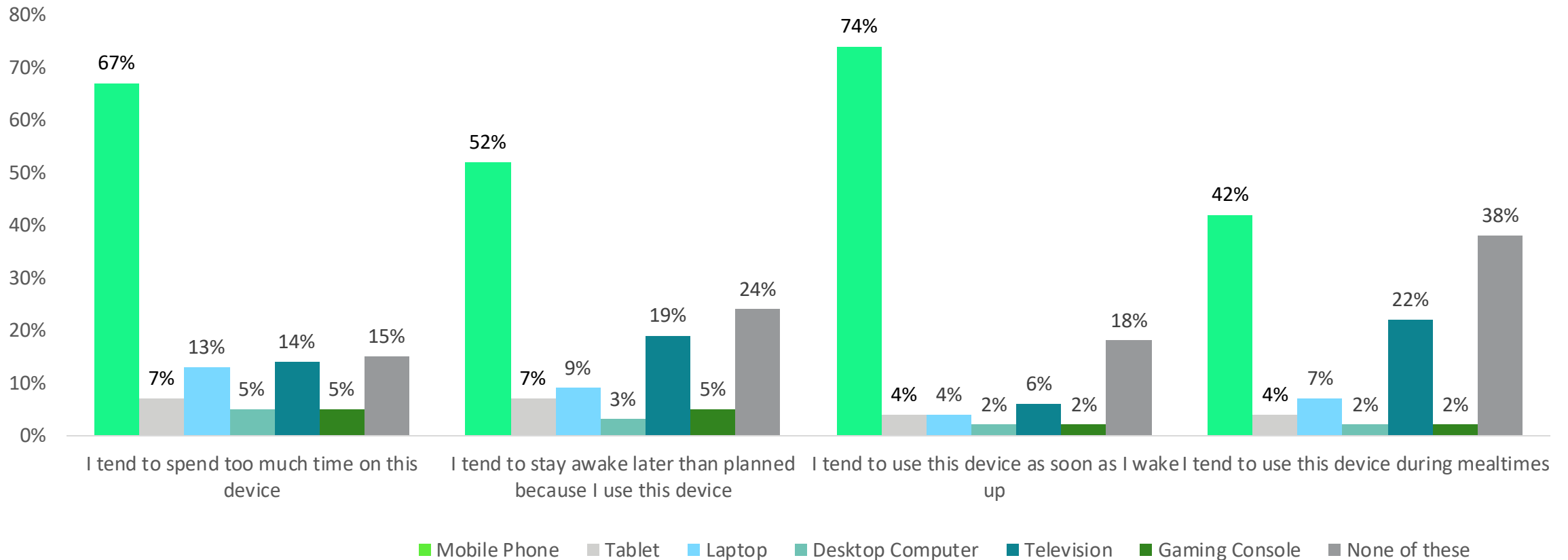


Weighted base: All smartphone owners aged 18-75, 2018 (931), 2019 (909), 2020 (905), 2021 (941), 2022 (938), 2023 (957)  
 Source: Deloitte Digital Consumer Trends, Ireland, Jun 2018, Jun-Jul 2019, Jun-Jul 2020, Jul-Aug 2021, Aug 2022, Sep 2023  
 Digital Consumer Trends 2023 - Ireland

**Device use:** Three quarters (74%) of adults use their phone as soon as they wake up. 67% state they tend to spend too much time on their mobile phone.

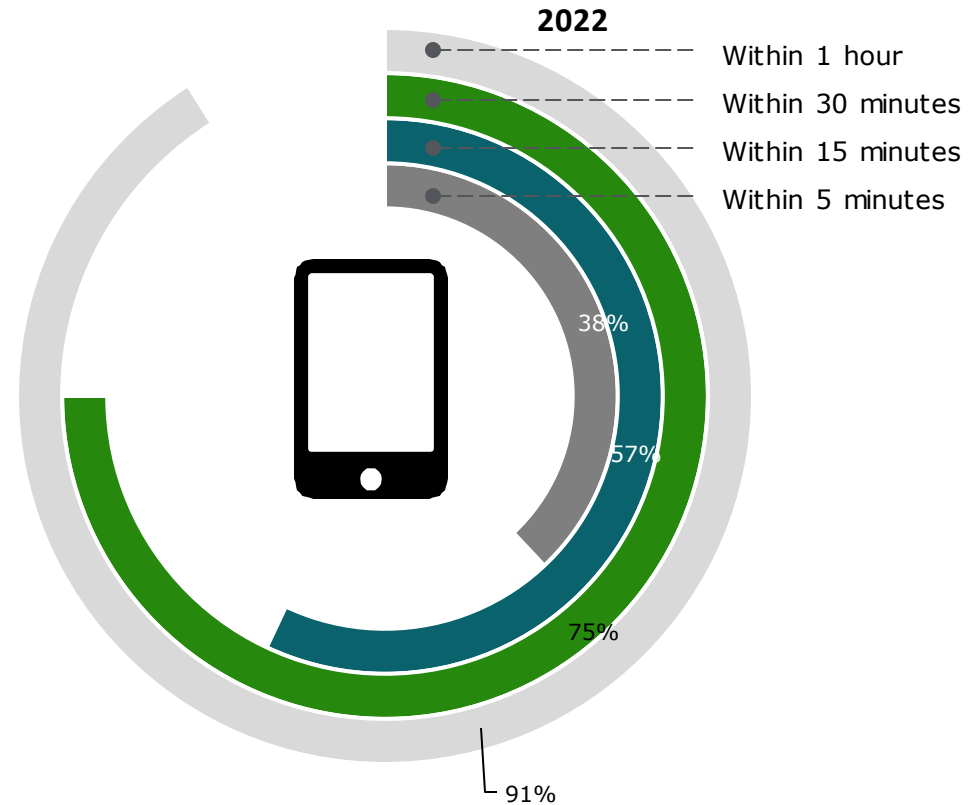
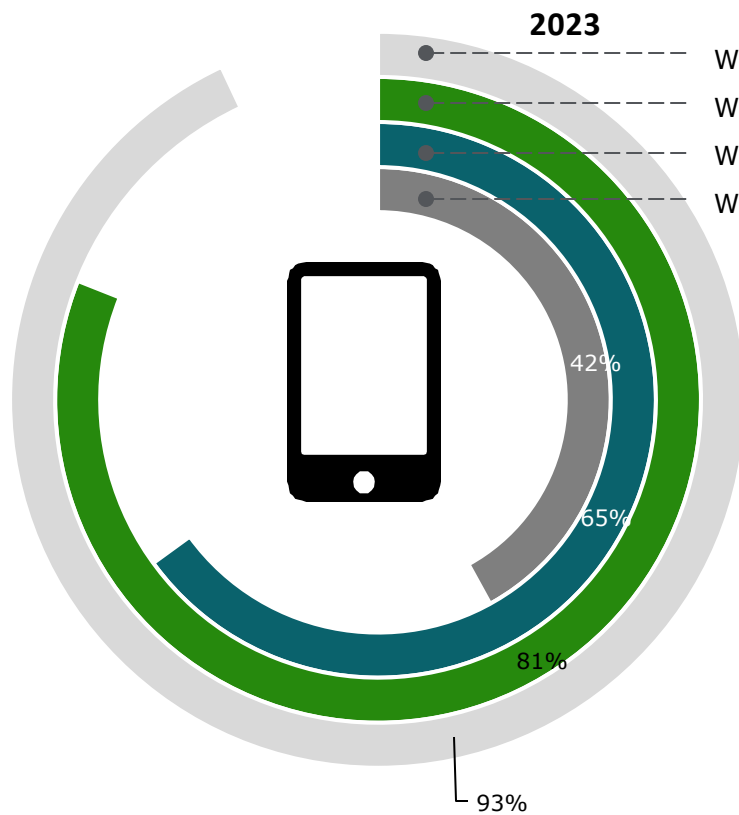


Q. Thinking about the following statements, which of the following devices does it apply to, if any?



# Device use: 65% of phone owners look at their phone within 15 minutes or less after waking up.

Q. Typically, how long is the interval between waking up and looking at your phone for the first time?



# Preferred Devices for Various Activities: Mobile is the preferred device for banking, online search, browsing, playing games and shopping, while TV is preferred for long-form content, such as movies.

Q. Which, if any, is your preferred device for each of the following activities?

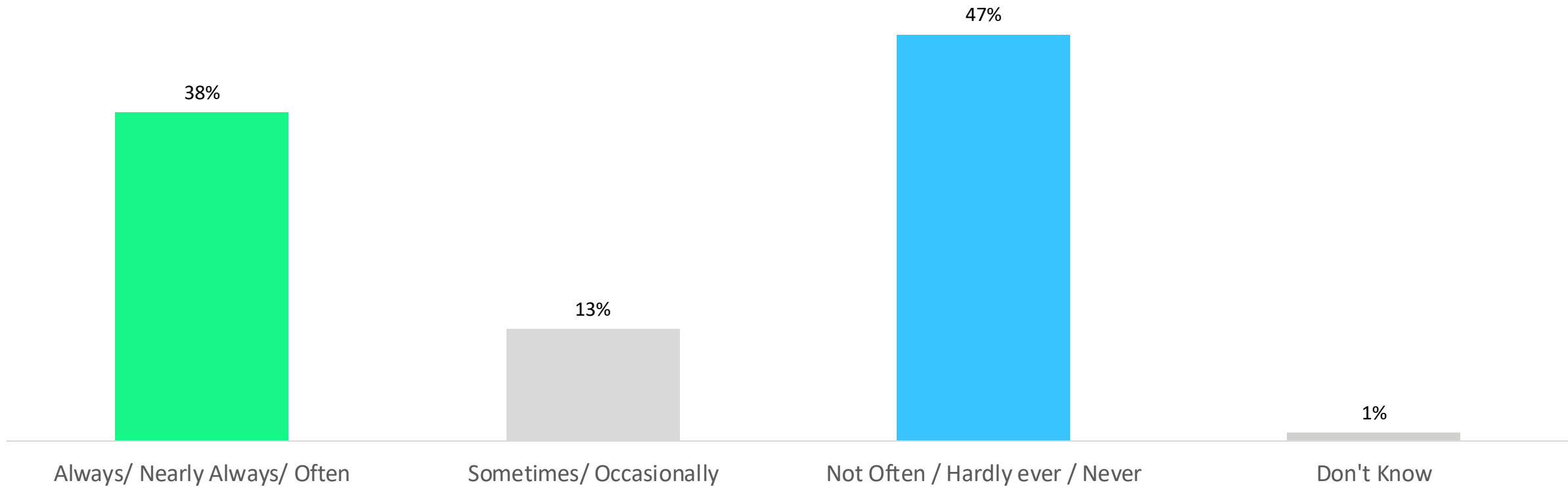


Digital  
Consumer  
Trends

Ireland (2022-23)	Total	Male	Female	18-24	25-34	35-44	45-54	55-64	65+
Browse shopping websites	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile (was Laptop)	Mobile (was Laptop)
Make online purchases	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile (was Laptop)	Mobile (was Laptop)
Online search	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile (was Laptop)	Mobile
Check bank balances	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile	Mobile
Play games	Mobile	Mobile (was Gaming console)	Mobile	Mobile	Gaming console	Mobile	Mobile	Mobile	Mobile
Stream films and/or TV series	TV	TV	TV	TV	TV	TV	TV	TV	TV
Watch TV programs via catch-up services	TV	TV	TV	TV	TV	TV	TV	TV	TV
Watch live TV	TV	TV	TV	TV	TV	TV	TV	TV	TV

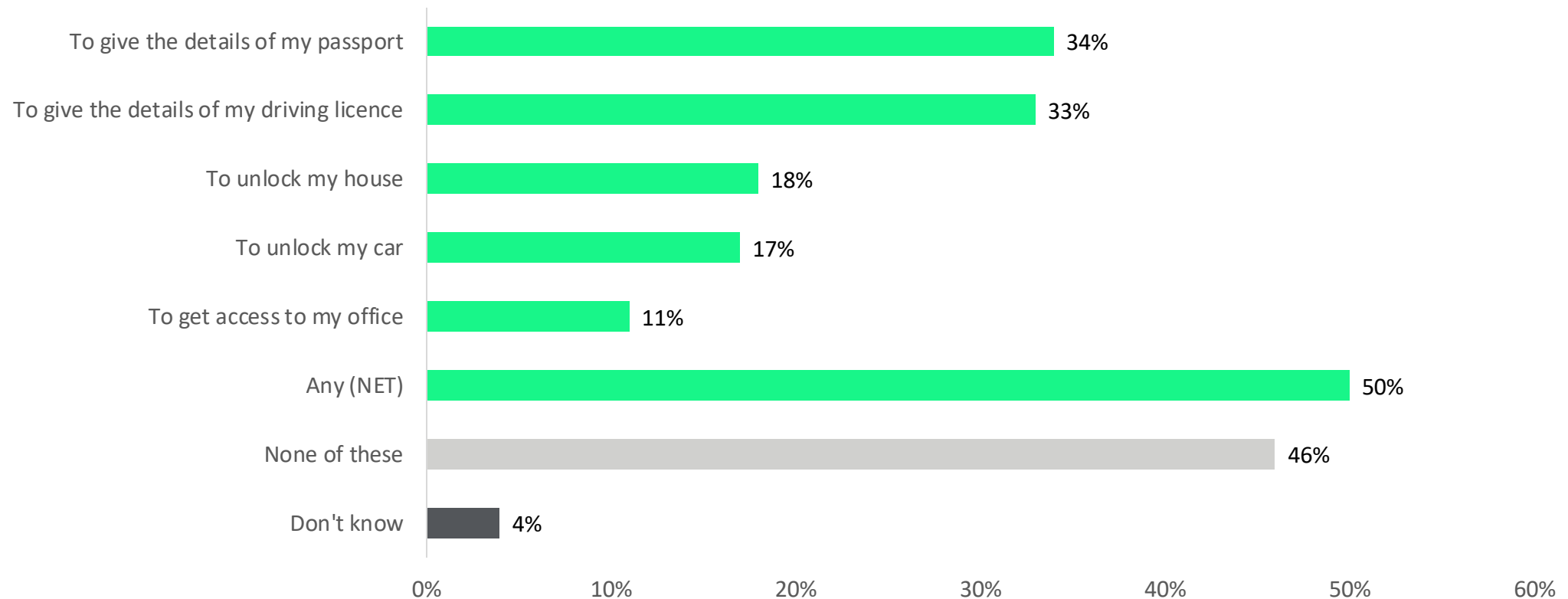
# In-Person Mobile Payments: Almost two in five (38%) adults regularly use their smartphone or smartwatch to make in-person payments.

Q. When the option is available, how often do you use a smartphone or to pay for things in person, for example in a shop or restaurant?



# Digital Identity: Adults in Ireland are not clamouring for digital identity solutions; 34% would like smartphone passport integration and 33% to be able to give the details of their driving licence.

Q. Which, if any, of the following would you like to be able to use your smartphone for instead of using other items, such as physical keys, ID cards or documents?



**Entertainment**

The background of the slide is an abstract composition. On the right side, there are several overlapping, semi-circular shapes filled with a dense, wavy pattern of fine lines in shades of light blue and teal. These shapes overlap a central horizontal band that features a fine, light blue grid pattern. The overall effect is a modern, digital aesthetic.



## 1 Entertainment

### Entertainment

- Access to Smart TV's has increased from 66% to 71% of respondents.
- Access to video streaming services subscription is stable at 75%. Netflix is still the leader, with nearly 2 in 3 (64%) having access to it.
- Disney+ continues to grow and is up by +9pp at 33%, compared to 2021.
- 24% cancelled a video streaming service in the P12M, with the main reason being that it wasn't being used enough (33%), it was too expensive (24%) or they needed to spend less on subscriptions to account for rising costs (23%).





## The report

01

### Stalled growth

With TV the preferred device for watching long-form content, such as movies combined with the increase to access to Smart TV's (71%), it is not surprising that access to subscription services remains strong, with 74% of respondents having access to at least one paid digital subscription service, having seen growth over the last number of years this is marginally down on prior year at 75%. On the positive side, the average respondent had access to 2.3 subscriptions services, up from 2.2 on 2022. The rate at which new subscribers are signing up is consistent with the prior year at 21% (2022: 20%) of respondents adding a new subscription in the previous 12 months, but significantly down from 25% in 2021.

The market is dominated by a small number of providers with Netflix remaining the most popular with 62% of respondents having a Netflix subscription, although this is marginally down on 2022 64% (2021: 65%). Disney+ continues to grow year on year from 24% in 2021 to 33% in 2022 to 36% in 2023.

Conversely, cancellation rates in the previous 12 months continue to increase from 20% in 2022 to 24% in 2023. The primary reason for the churn remains the lack of usage at 33%, up 2 percentage points on 2022. Unsurprisingly cost was the second reason for cancelling subscriptions.

However, the re-subscription rate has increased to 16% from 12% in 2022. Overall, however 41% of users did not change their subscriptions in the current year, which is consistent with the prior years.



## The report

02

### **Focus on profitable growth**

Based on Deloitte's TMT Predictions, in 2024, streamers are expected to charge more for premium content, fight churn with longer subscriptions, and satisfy bargain hunters with more pricing tiers.

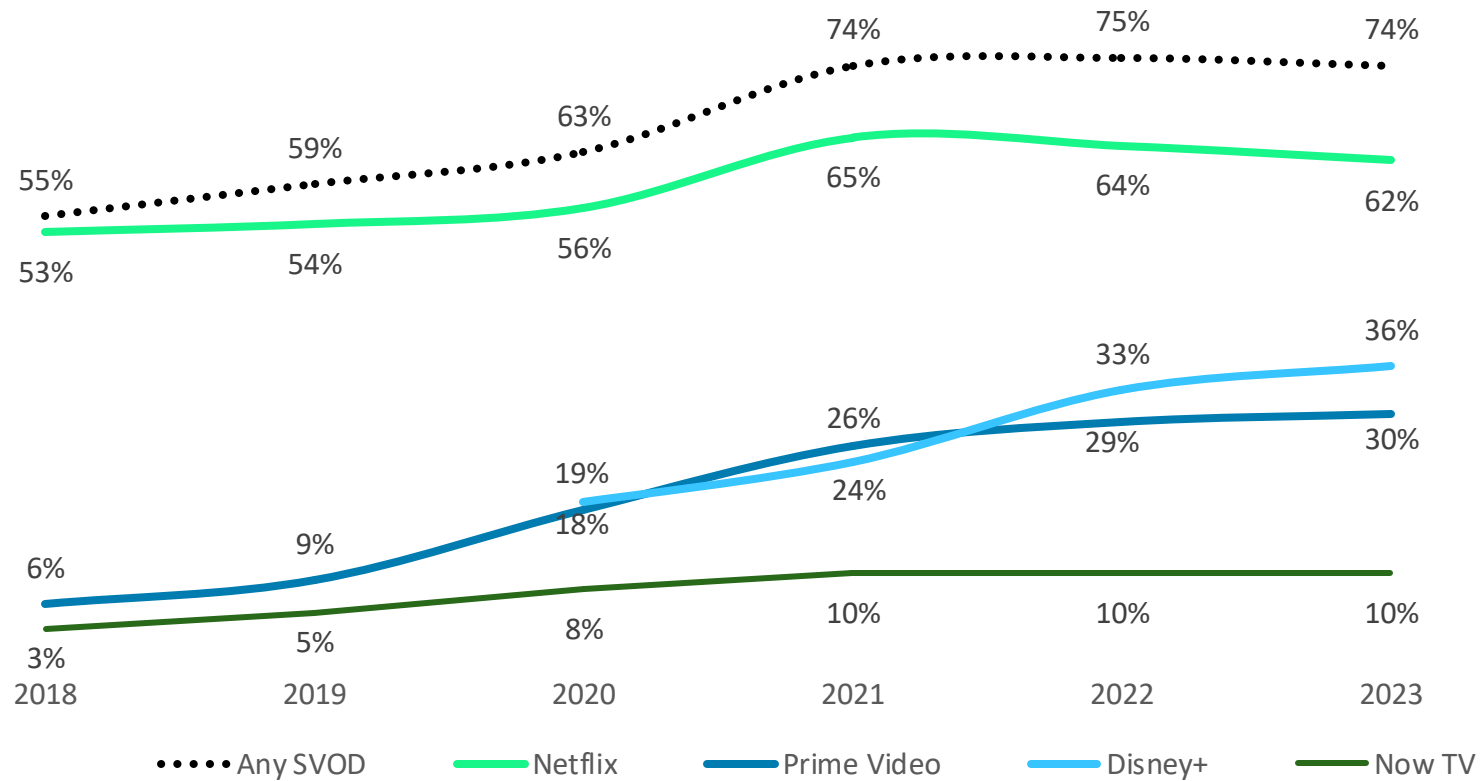
More than a decade into the streaming video revolution, media and entertainment (M&E) companies seem to be realising how hard it is to recoup the historic profits of the pay TV business model. In 2024, Deloitte predicts that the combined number of subscription video on demand tiers offered by the top US providers will more than double between 2022 and 2024: from an average of four options to eight. From cheap ad-supported offerings and gated content to premium tiers with instant access, streamers are expected to shift from growth at all costs to making it easier for all their subscribers to get enough value for the price. Viewers may find it harder to wade through the options, but tiering could help them get more of what they want, and less of what they don't. 31% of respondents would still prefer to pay a full price subscriptions with no ads.

Over the last 12 months there has also been much coverage around Netflix's restrictions on account sharing. Based on the responses to our survey only 37% (2022: 35%) of users share their account with other households. The incidence of sharing is most widespread among the youngest age group. Among the 18-24 year old respondents nearly 60% share their account. It is lower amongst the 25-34 years olds at 45%.

However, when asked about any crackdown in account sharing just above a third (36%) would consider paying extra to keep sharing a video subscription account, while 7 in 10 would not consider taking out a second account at full price.

# SVOD Share: Access to SVOD services has remained stable with little fluctuation among subscription service providers.

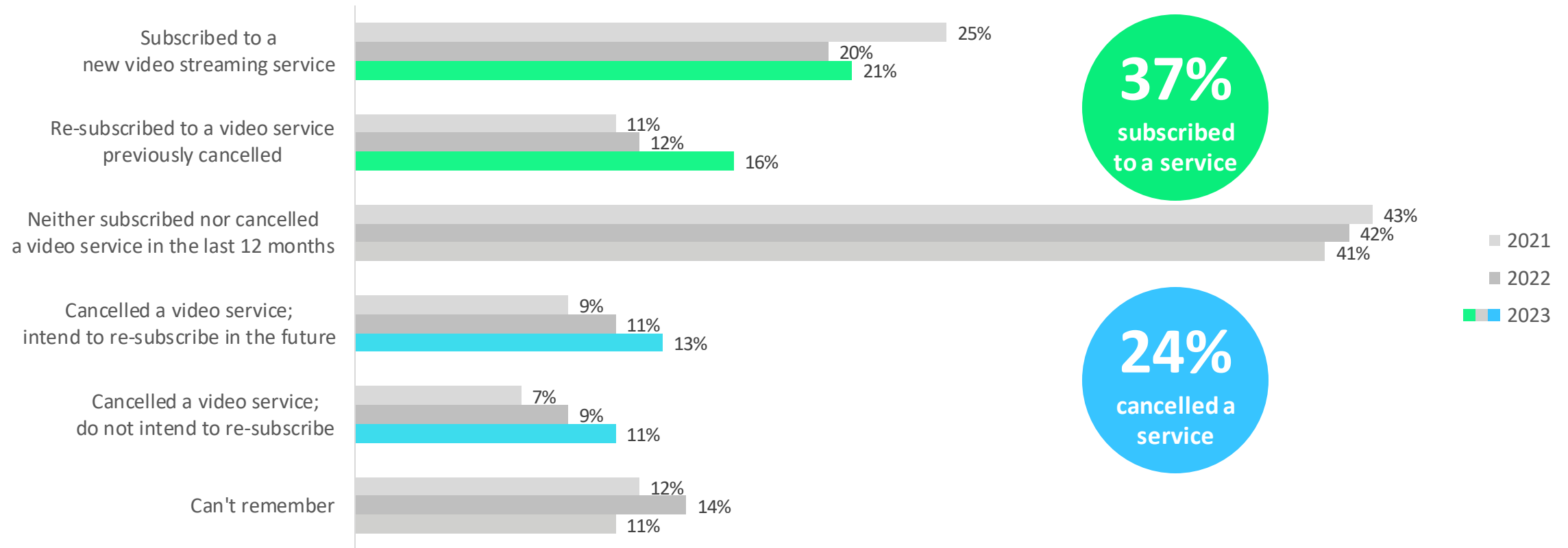
Q. Which, if any, of the following paid digital subscription services do you have access to?



Weighted base: All respondents aged 18-75 in 2018 (1,000), 2019 (1,000), 2020 (1,000), 2021 (1,000), 2022 (1,001), 2023 (1,000)  
 Source: Deloitte Digital Consumer Trends Ireland, Jun 2018, Jun-Jul 2019, Jun-Jul 2020, Jul-Aug 2021, Aug 2022, Sep 2023  
 Question text: Added word 'paid' in 2023, not present in previous years.

# SVOD Churn: Although 41% have not changed their video subscription services, 37% have subscribed to a service and 22% have cancelled a service.

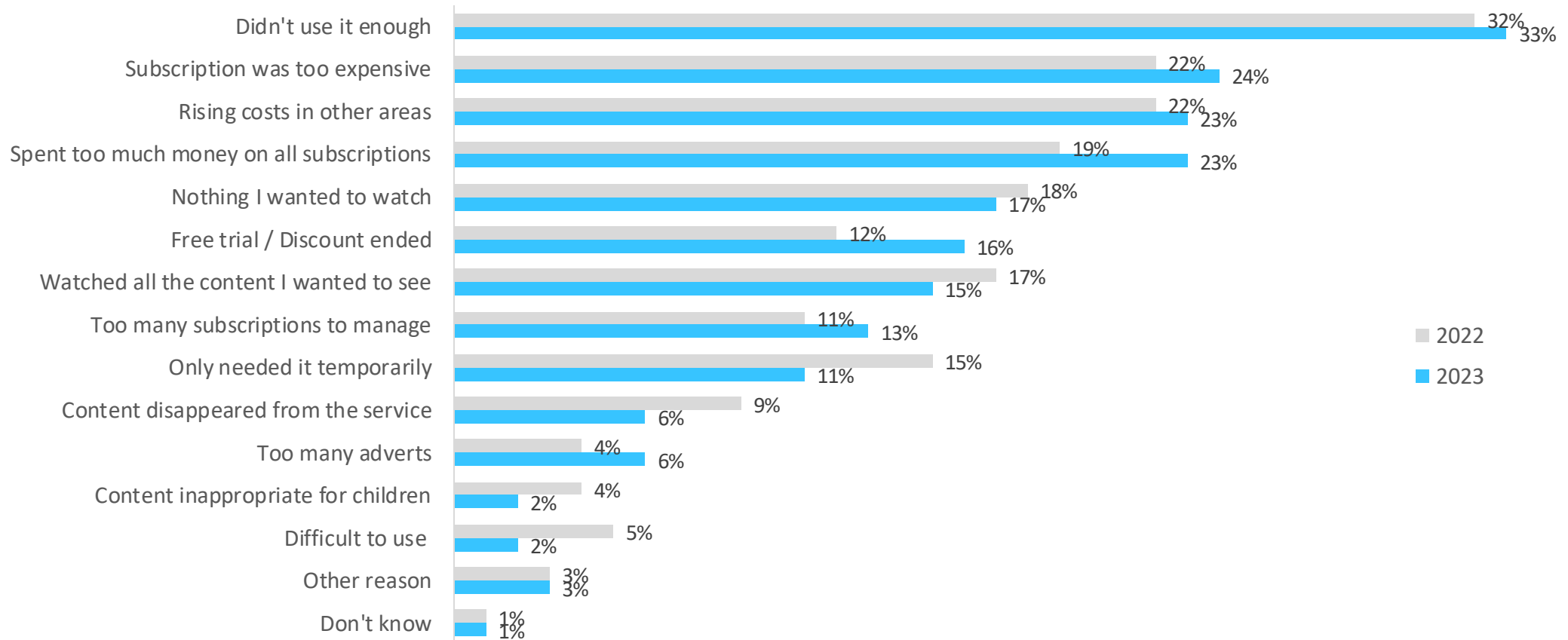
Q. In the last 12 months, have you or someone else in your household subscribed to any paid subscriptions for a video streaming service (e.g. Netflix, Disney+), or cancelled any existing ones?



Weighted base: All respondents aged 18-75 in 2021 (1,000), 2022 (1,001), 2023 (1,000)  
 Source: Deloitte Digital Consumer Trends, Ireland, Jul-Aug 2021, Aug 2022, Sep 2023  
 Digital Consumer Trends 2023 - Ireland

# Reason for Churn: Not using it enough and subscriptions being too expensive are the two main reasons for cancelling a video streaming subscription in the past 12 months.

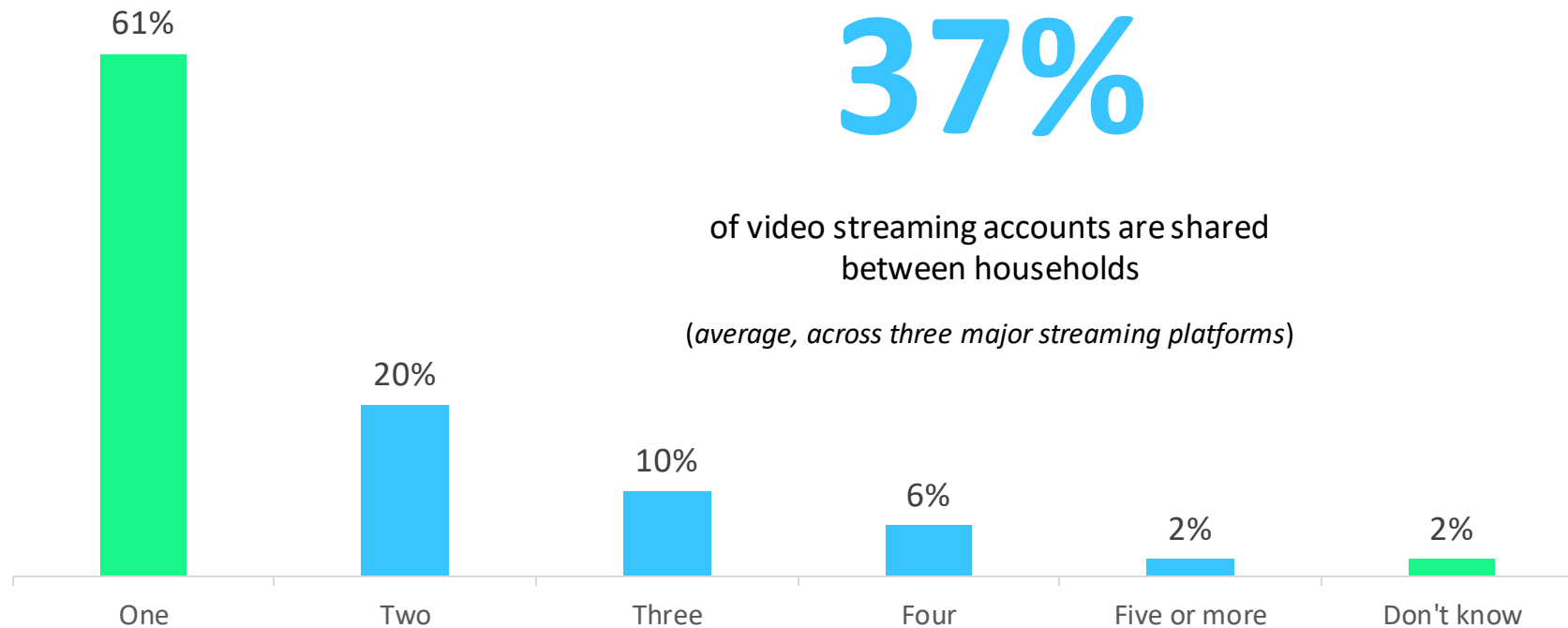
Q. You have cancelled a paid subscription for a video streaming service in the last 12 months, why?



Weighted base: All respondents aged 18-75 who have cancelled a video streaming subscription service in the last 12 months in 2022 (245), 2023 (338)  
 Source: Deloitte Digital Consumer Trends, Ireland, September 2023  
 Digital Consumer Trends 2023 - Ireland

# SVOD No. of Homes: While the majority of adults (61%) do not share their access to their video subscriptions outside their household, 37% share accounts between two or more households.

Q. You mentioned that you have access to a video subscription account. Including your own, approximately how many households share each of the following accounts\*?



Weighted base: All respondents aged 18-75 who have access to paid video subscription service in 2023 (Netflix: 623/ Amazon Prime Video: 301/ Disney+: 360)

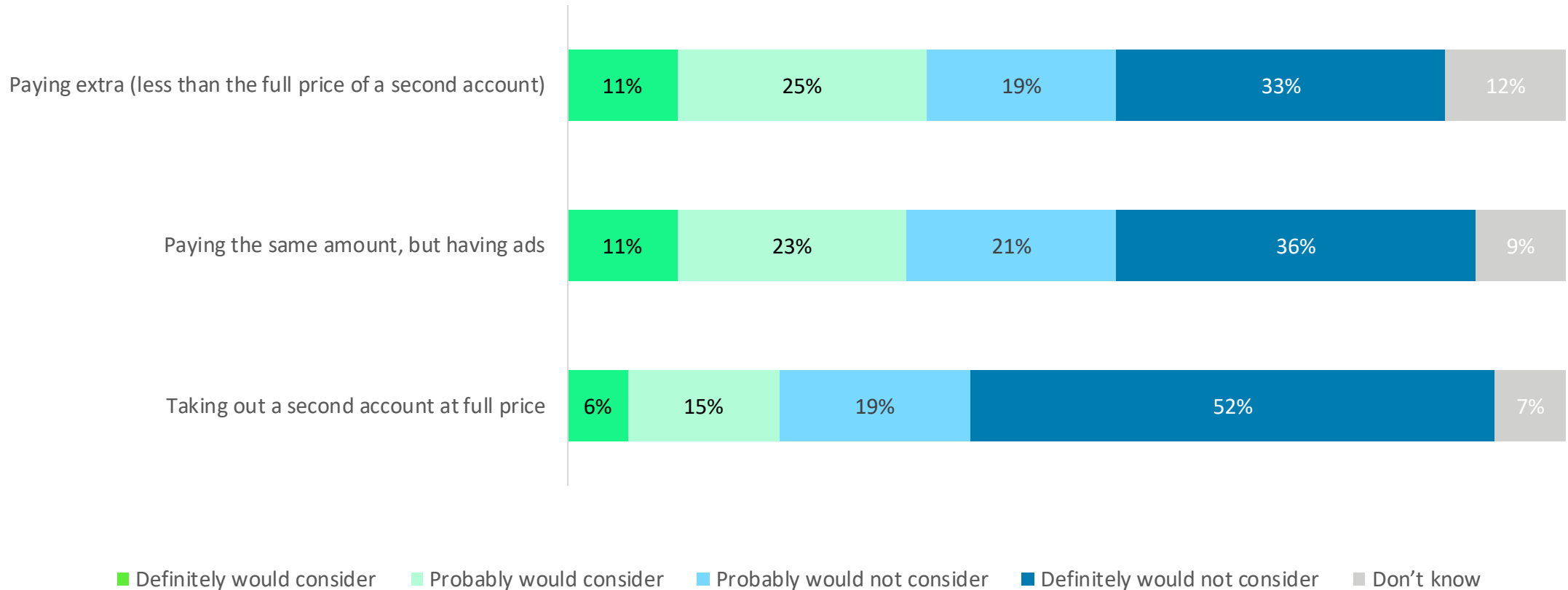
Source: Deloitte Digital Consumer Trends, Ireland, September 2023

Digital Consumer Trends 2023 - Ireland

\*Asked of those who use streaming services, mean average

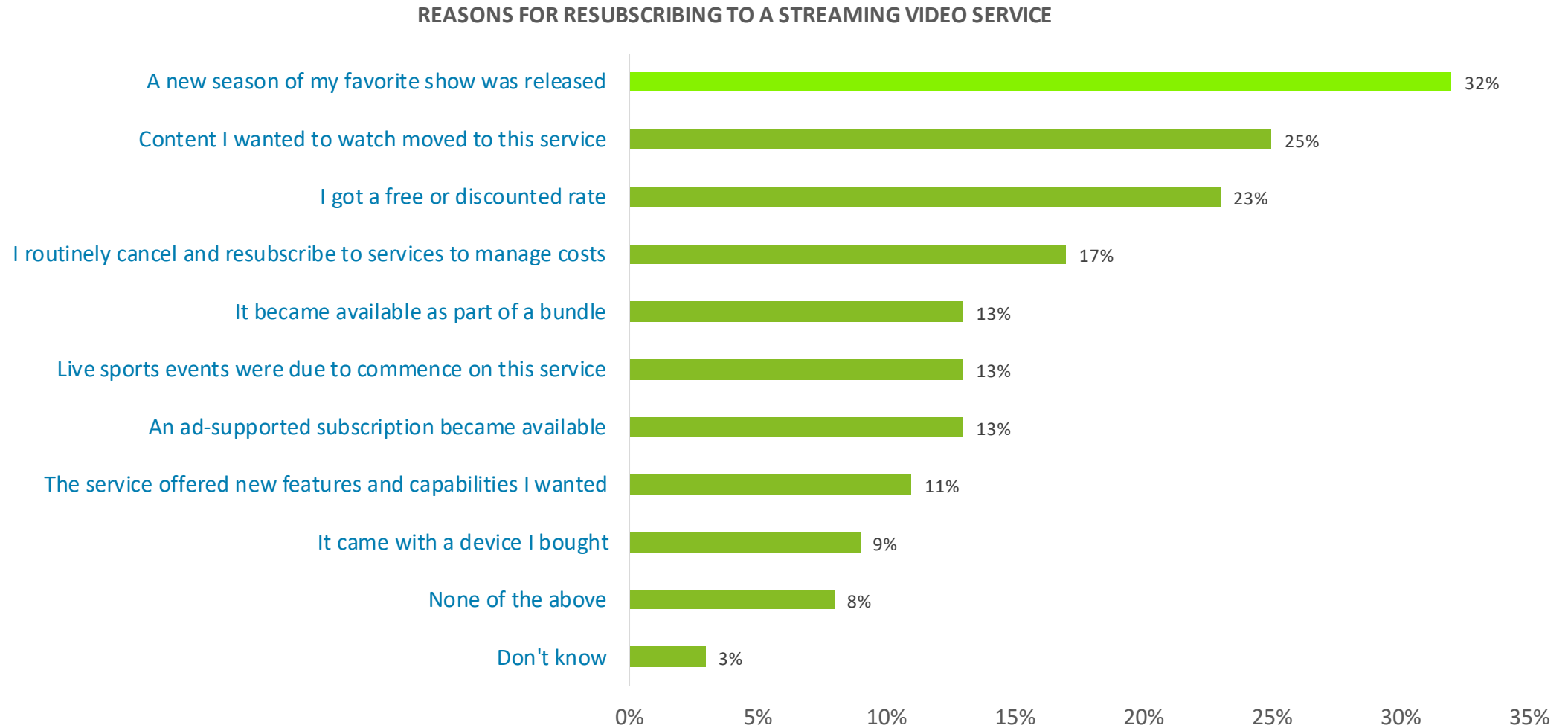
# Response to Sharing Crackdown: Just above a third (36%) would consider paying extra to keep sharing a video subscription account, while 7 in 10 would not consider taking out a second account at full price.

Q. If sharing video subscription service accounts with people outside your household was banned would you or would you not consider any of the following to be able to continue sharing with them?



Weighted base: All respondents aged 18-75 who have access to any paid video subscription service in 2023 (740)  
 Source: Deloitte Digital Consumer Trends, Ireland, September 2023  
 Digital Consumer Trends 2023 - Ireland

Watching a new season of a favourite show is the main reason for resubscribing to a video streaming service for 32%. More than 1 in 5 have resubscribed in order to watch content that has moved to the service or because they got a free or discounted rate.



**Q. Which of the following are reasons you decided to resubscribe to a streaming video service?**

Weighted base: All respondents who resubscribed to a video streaming service in the last 12 months (117)  
Source: Deloitte Digital Consumer Trends, Ireland, Aug 2022  
Digital Consumer Trends 2023 - Ireland



## Get In touch



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