

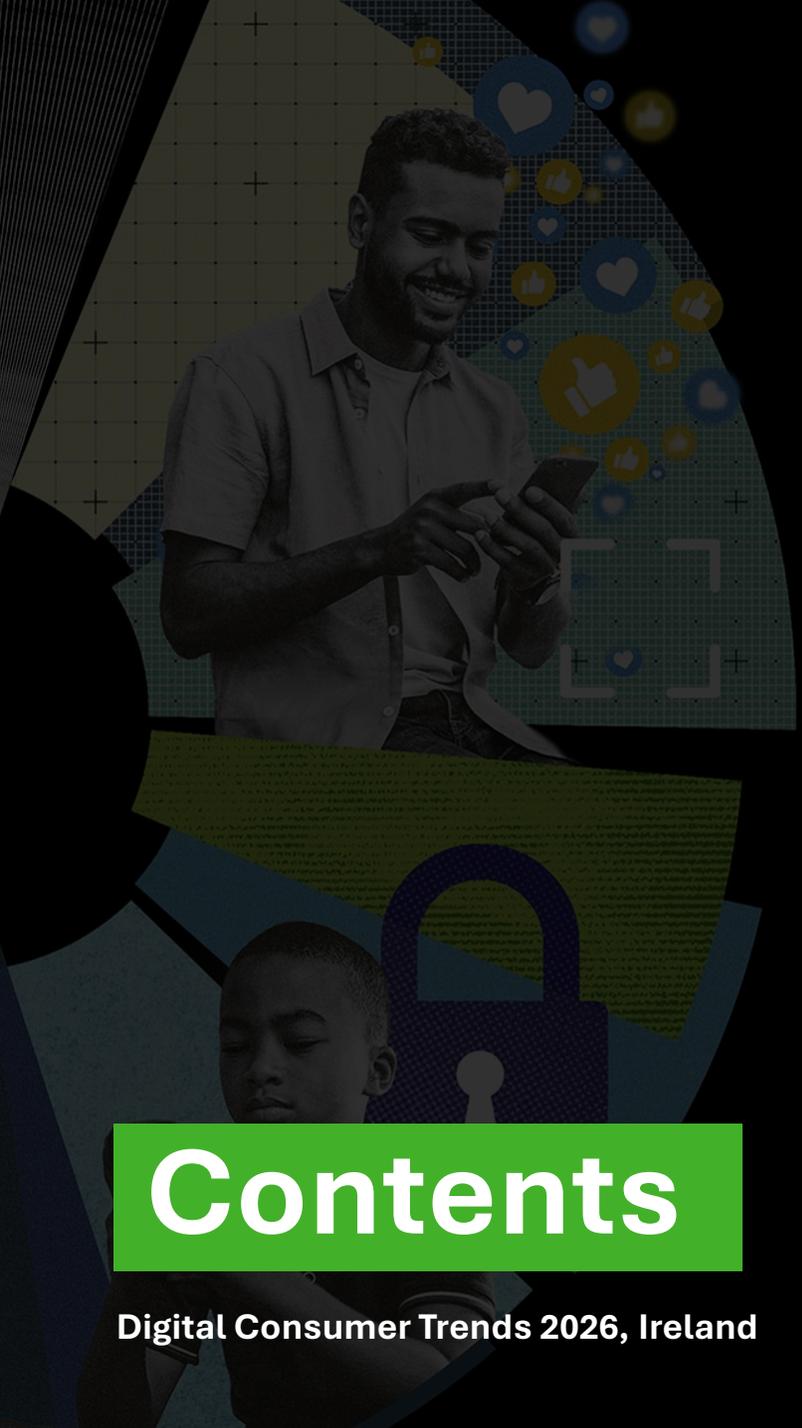
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Digital Consumer Trends 2026

Ireland

February 2026





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Digital Consumer Trends 2026, Ireland

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About Deloitte's

Digital Consumer Trends 2026

- Digital Consumer Trends 2026 (Ireland) is conducted by Deloitte's Technology, Media and Telecommunications (TMT) practice.
- Digital Consumer Trends is a multi-country study of how people engage with and purchase digital products. It spans devices, connectivity, media, and emerging technologies, and is now in its sixteenth year of publication. It was previously known as the Mobile Consumer Survey.
- Fielded in November 2025 by an independent research agency, the survey was asked of 1000 consumers in Ireland between 18-75, and weighted for demographics such as age, gender, region and working status.
- Questions cited in this document may be simplified for the sake of visualisation.

Gen Z

BORN 1996–2007

Age range 18–29



Millennials

BORN 1980–1995

Age range 30–45



Gen X

BORN 1966–1979

Age range 46–59



Boomers

BORN 1950–1965

Age range 60–75



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Generative AI & Workforce

Digital Consumer Trends 2026, Ireland Edition



Key Takeaways



GenAI has crossed the tipping point into everyday life

GenAI is now becoming a normal part of how people find information, communicate, and make decisions.

- GenAI use has nearly doubled in the last two years to 64% in 2025, becoming a mainstream tool for personal (75%), work (42%), and educational purposes (36%).
- Usage varies by generation; over 75% of Gen Z and Millennials use GenAI, compared to just over half of Gen X and only a third of those aged 60 to 75.

Key take away: As AI usage continues to grow, companies should recognise Generative AI not as a passing trend but as a vital digital competency that will increasingly influence consumer behaviour.



GenAI is becoming a two-speed workforce issue

Generative AI adoption varies widely across generations, suggesting a structural divide in familiarity and usage within the workforce.

- 83% of Gen Z actively use these tools compared to just 57% of Gen X, suggesting a two-speed workforce, highlighting significant differences in AI adoption.

Key take away: Organisations need to tailor AI Fluency programmes to accommodate varying AI skill levels, offering foundational training for late adopters and advanced support for experienced users. Prioritising inclusive training that builds confidence and competence among older employees is essential to close the generational AI gap.



Free tool usage is a governance and data risk for organisations

Employees increasingly rely on free or self-paid tools to solve work problems, which presents both challenges and opportunities for organisations.

- 46% use external free tools, 35% use organisation-paid tools, and 20% self-pay, indicating diverse approaches to accessing technology.
- 19% of employees reported a lack of guidance or policies within their organisations in 2025, compared to 90% in 2024

Key take away: Organisations should implement clear policies and governance frameworks alongside secure, enterprise-grade AI platforms that meet data protection and regulatory requirements.



The Generative AI Dilemma: Permission, Prohibition, and Policy Ambiguity

Use of Generative AI at work is growing, but organisational approaches to its adoption vary, impacting both risk and innovation.

- 46% of respondents are encouraged to use AI at work, while an additional 13% report that their workplace permits AI use but does not actively promote it.
- 10% face active discouragement or bans.

Key take away: Absence of policy creates ambiguity, which can suppress beneficial AI adoption. Restrictive policies may reduce risk but can also hinder innovation and push AI use underground (shadow AI).

Key Takeaways



GenAI is currently a language and knowledge work multiplier and not yet a deep-technical tool

Generative AI is increasingly being used to assist productivity in routine cognitive tasks.

- Employees use AI tools to rapidly find data (56%), draft communications (44%), and generate ideas (43%).

Key take away: Organisations should explore and invest in advanced technical AI applications, including agentic AI, as these technologies have the potential to autonomously perform complex tasks and significantly enhance operational efficiencies within organisations.



Ensuring Accuracy and Trust to avoid risk

Generative AI outputs are often perceived as reliable, but this perception can create risks if organisations do not implement proper “verify-first” habits, guidance, and controls in the workplace.

- 28% of consumers believe Generative AI outputs are always factually accurate, while 27% are unbiased.

Key take away: Organisations must prioritise training the workforce in critical evaluation and fact-checking, encouraging employees to treat AI-generated content as a starting point rather than an infallible source. "Human-in-the-loop" governance is vital to ensure autonomous actions remain ethical and accurate.



Supporting the Workforce through Change

Concerns remain that GenAI will reduce jobs overall, while fewer expect their own role to change.

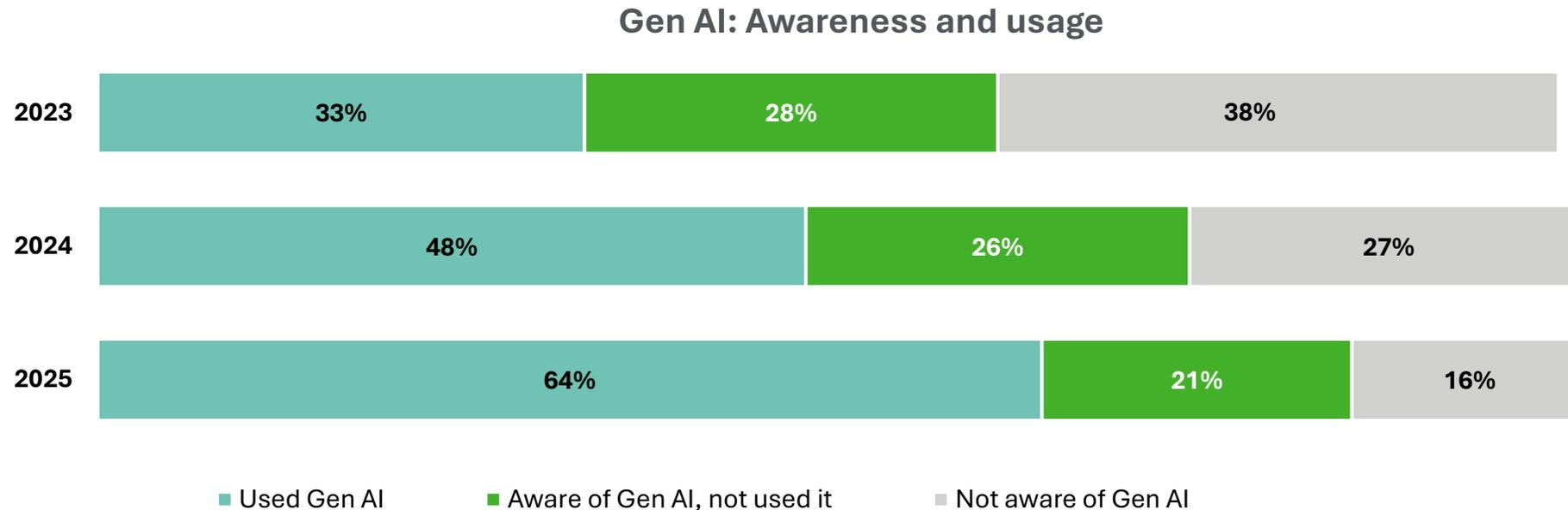
- 68% of respondents believe GenAI will reduce job numbers, replacing human work.
- 52% are concerned that GenAI will replace some of their role in the workplace

Key take away: Companies can address the "optimism gap" by promoting AI as a tool to augment skills. By providing transparent communication alongside reskilling programmes, organisations can build trust and help employees embrace AI confidently.

The adoption of generative AI continues to grow, with almost two in three adults in Ireland who have used a generative AI tool.

Generative AI has crossed the tipping point into everyday life

Between 2023 and 2025, Generative AI usage among adults in Ireland nearly doubled from 33% to 64%, reflecting rapid adoption and a shift from occasional use to a regular part of daily life.



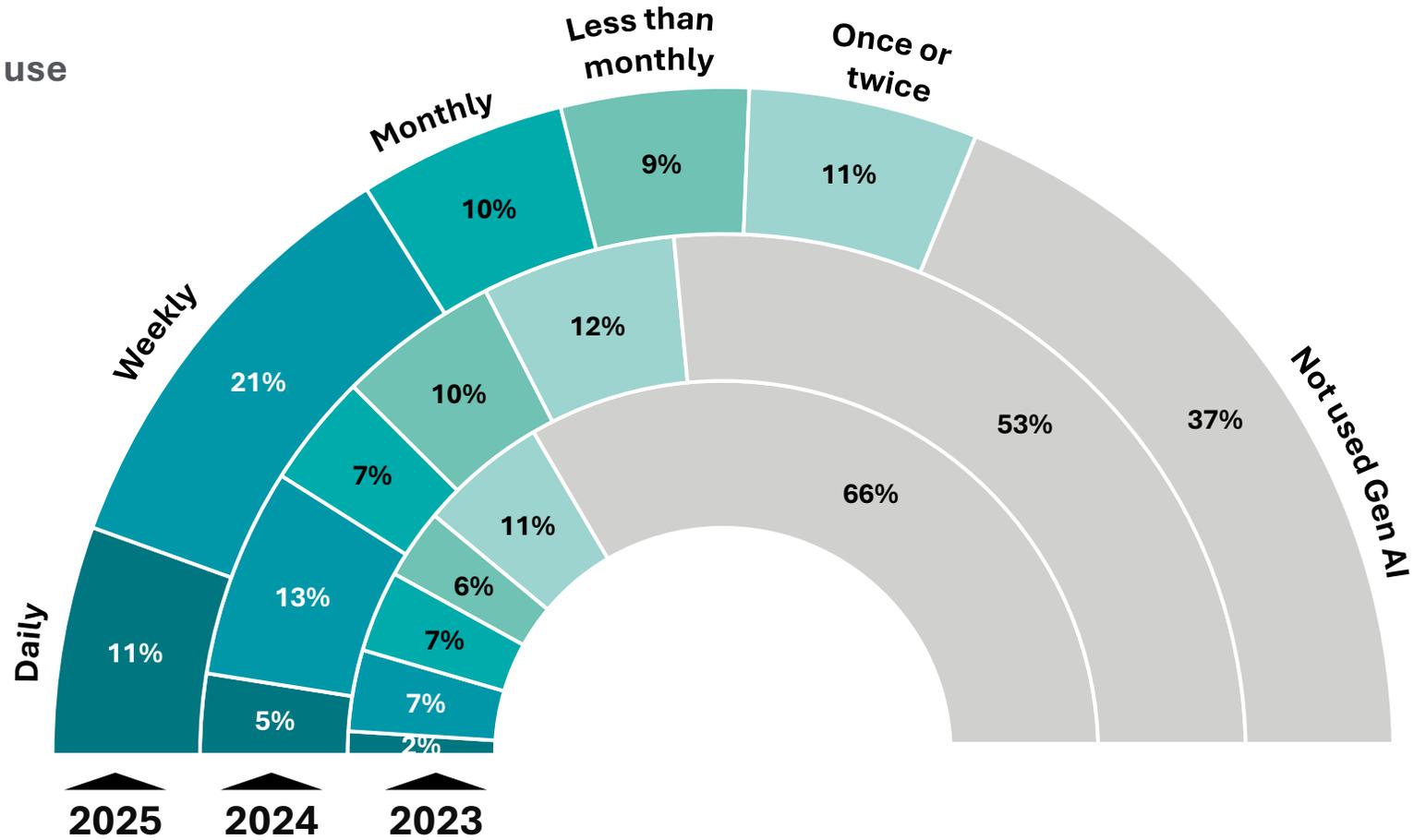
Question: Which, if any, of the following Generative AI tools are you aware of?; Which, if any, Generative AI tools have you used? [Choice from a range of tools, plus "Another"]

Weighted base: All respondents aged 18-75, 2023 (1,000), 2024 (1,000), 2025 (1,000). Respondents aware of generative AI, who did not know if they had used it were included into "Aware of Gen AI, not used it".

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Overall, a third (33%) of adults in Ireland use Gen AI at least weekly. Daily and weekly use of GenAI is doubling year-on-year, while non-usage consistently drops.

Gen AI: Frequency of use



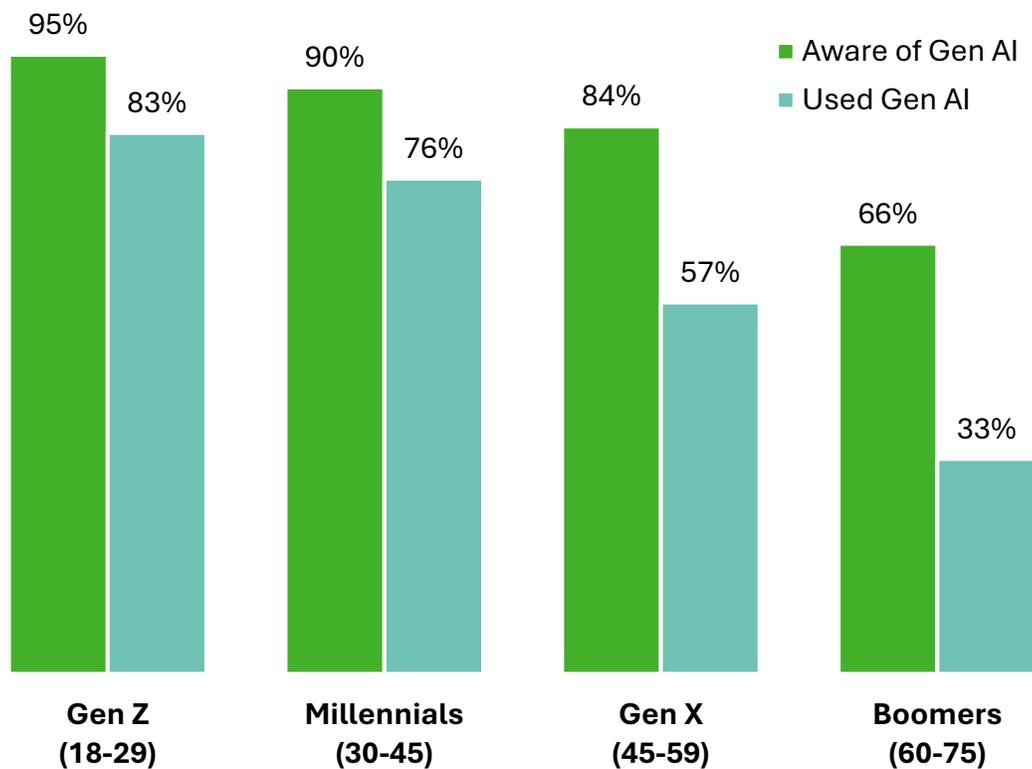
Question: You mentioned you have used Generative AI. Which of the following best describes your use?

Weighted base: All respondents 18-75, 2023 (1,000), 2024 (1,000), 2025 (1,000). For reference, those who have used any Generative AI tool, 2023 (336), 2024 (476), 2025 (637)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Overall, awareness and usage of Gen AI tools are higher among younger generations. Among Gen Z, 83% have used a generative AI tool; among boomers only 33% have used it.

Gen AI: Awareness and usage



Generative AI adoption shows a significant generational divide, with 83% of Gen Z using these tools compared to just 57% of Gen X.

This gap reflects differences in digital fluency, confidence, and exposure, creating a **‘two-speed workforce’** that may face productivity and collaboration challenges. Tailored AI enablement is essential to address varying starting points and learning needs across age groups, ensuring inclusive adoption and maximising workforce potential.

Companies need to tailor **AI Fluency programmes** to accommodate varying AI skill levels, offering foundational training for late adopters and advanced support for experienced users. Prioritising inclusive training that builds confidence and competence among older employees is essential to close the generational AI gap.

Additionally, fostering intergenerational collaboration through mentorship and mixed-age teams can accelerate AI adoption across the workforce. Addressing this divide will unlock diverse perspectives, drive innovation, and enhance productivity, positioning organisations for sustained success in an AI-driven future.

Question: Which, if any, of the following Generative AI tools are you aware of?; Which, if any, Generative AI tools have you used? [Choice from a range of tools, plus “Another”]

Weighted base: All respondents aged 18-75, 2025 (1,000); Gen Z (193), Millennials (340), Gen X (267), Baby Boomer (200). Respondents aware of generative AI, who did not know if they had used it were sorted into “Aware of Gen AI, not used it”.

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

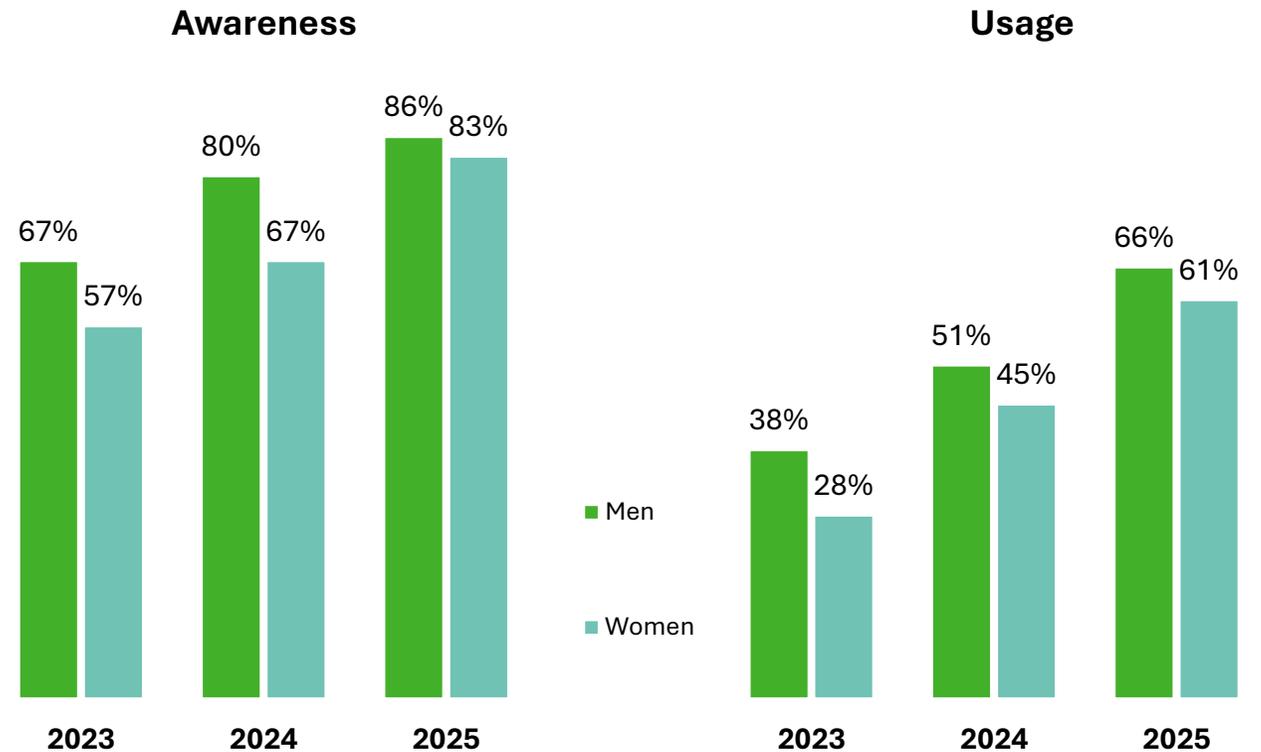
Gen AI awareness and usage between men and women is reducing but persists.

The Gender Gap is closing in AI awareness and use

In 2023, a significant gender gap existed in Generative AI adoption, with men more likely to use the technology than women. In 2025, this gap narrowed from 10% to 5%.

Continuing to close this gap is vital to ensuring AI's benefits are shared equally across genders. Focused efforts to foster inclusive cultures and address barriers will support balanced adoption, unlocking diverse perspectives and innovation critical for organisations to succeed in an AI-driven economy.

Gen AI: Awareness and usage by gender



Question: Which, if any, of the following Generative AI tools are you aware of?; Which, if any, Generative AI tools have you used? [Choice from a range of tools, plus "Another"]
 Weighted base: All respondents aged 18-75, 2023 (1,000), 2024 (1,000), 2025 (1,000). Respondents aware of generative AI, who did not know if they had used it were sorted into "Aware of Gen AI, not used it".
 Source: Deloitte Digital Consumer Trends, Ireland, November 2025

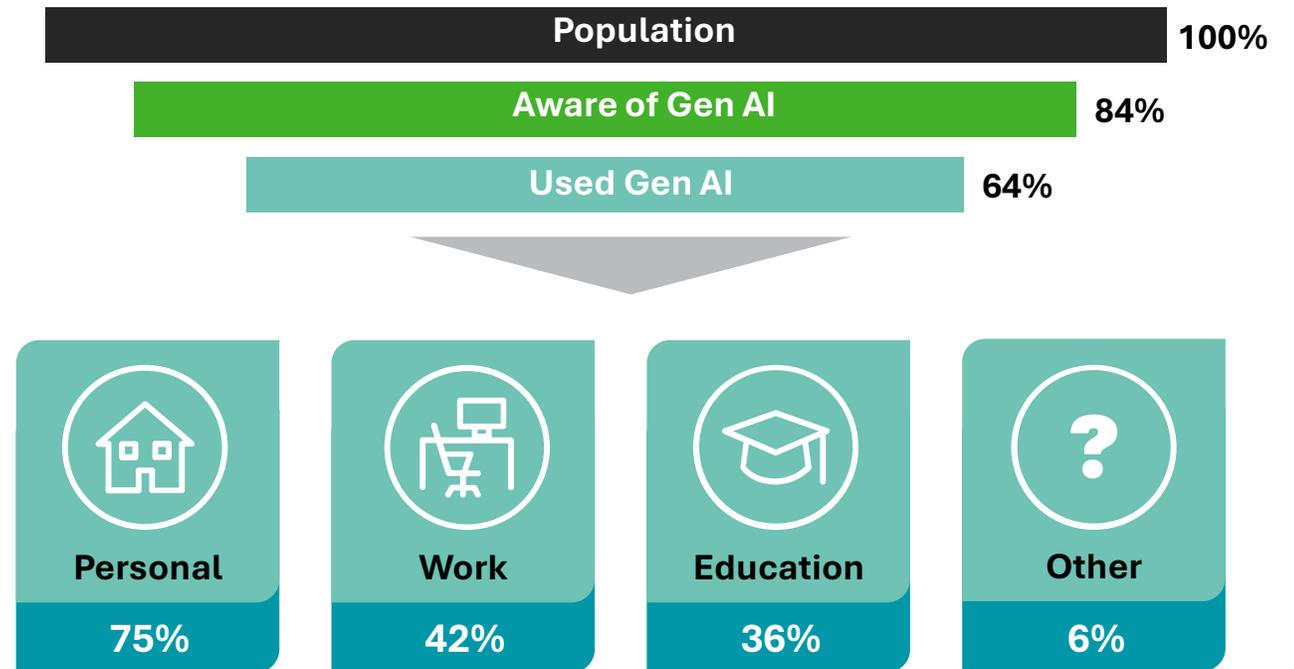
While most Gen AI users use it for personal purposes, 42% have used Gen AI for work and 36% for education.

The majority of Generative AI users primarily apply the technology for personal tasks, indicating its rapid and widespread integration into everyday life and reflecting strong comfort with AI beyond the workplace.

Aligning AI use across personal, educational, and professional contexts can accelerate adoption while mitigating potential risks, ensuring a more seamless and secure integration of AI technologies throughout all aspects of users' lives.

Furthermore, establishing clear policies and comprehensive training programmes is essential to promote responsible and secure use of Generative AI, helping to bridge the gap between informal employee adoption and formal organisational controls.

Gen AI: Purpose of use (among users)



Question: Which, if any, of the following Generative AI tools are you aware of?; Which, if any, Generative AI tools have you used? [Choice from a range of tools, plus "Another"]

Which of the following purposes have you used any generative AI for?

Weighted base: All respondents aged 18-75, 2025 (1,000), who have used generative AI (637).

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

More people have passively engaged with Gen AI through everyday online applications than have actively used a purpose-built Gen AI tool.

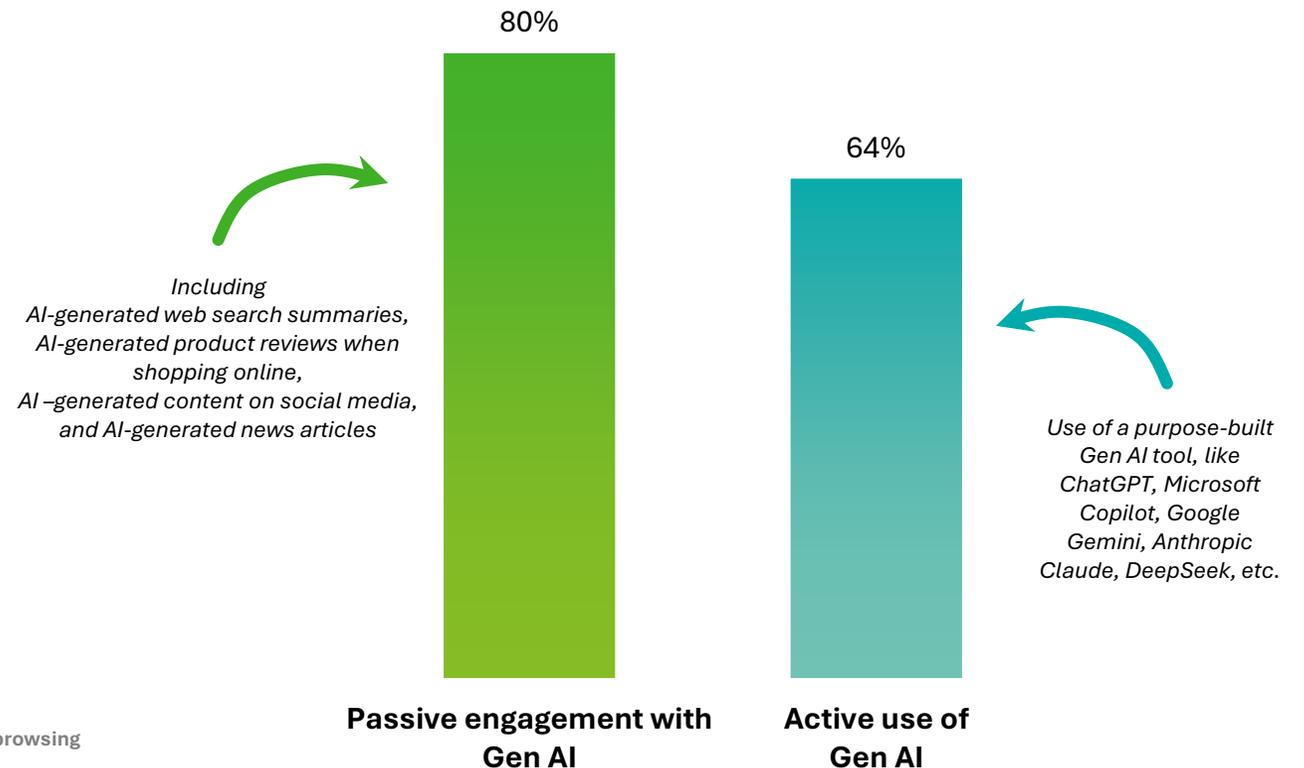
From “tools” to “ambient AI” - people are currently using GenAI without realising it

Most consumers passively encounter AI-generated content daily, through social media, web search summaries, product reviews, and news articles, often without direct interaction or awareness.

This unconscious exposure highlights AI's deep integration into our digital experiences, creating both opportunities and challenges for organisations. As the shift towards ‘Agentic AI’ accelerates and AI moves from a passive assistant to a proactive digital colleague, we can expect to see more active use.

To prepare, organisations must establish "human-in-the-loop" governance to ensure autonomous actions remain ethical and accurate.

Gen AI: Passive engagement vs active use



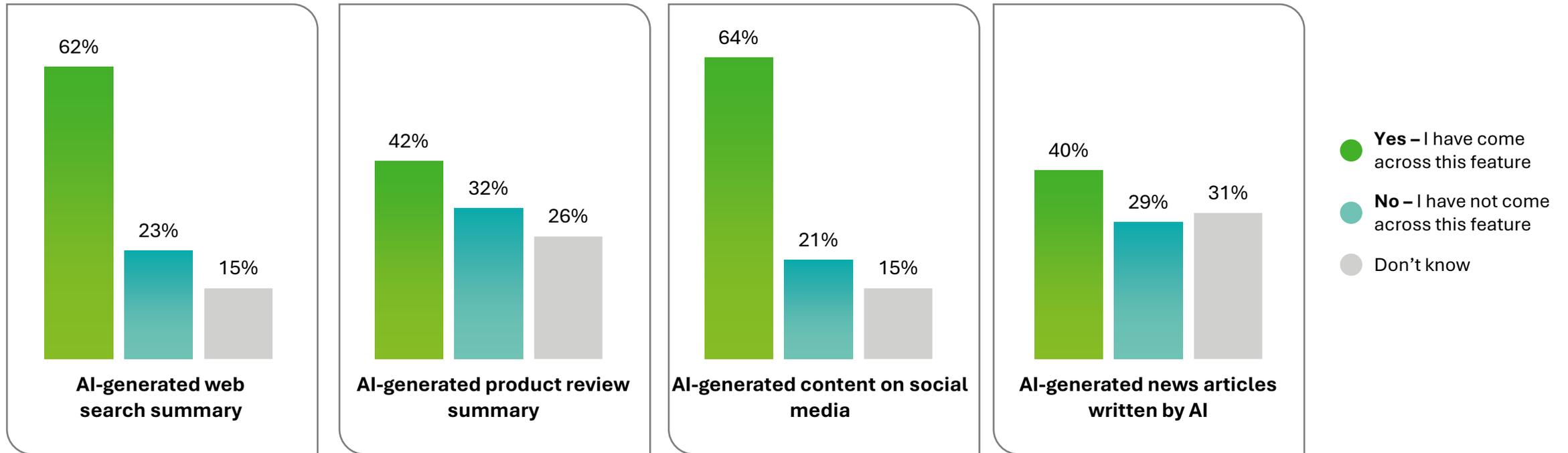
Question: In the last 12 months, have you come across any of these AI features while using your devices or browsing online?; Which, if any, generative AI tools have you used?

Weighted base: All respondents aged 18-75, 2025, (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

64% have come across AI-generated content on social media, while 62% have come across AI-generated web search summary.

“Passive” Gen AI: Features noticed while browsing online



Question: In the last 12 months, have you come across any of these AI features while using your devices or browsing online?

Weighted base: All respondents aged 18-75, 2025 (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Among those who use Gen AI for work, 45% use a ‘free to use’ tool.

Free tool usage is a governance and data risk for organisations

Many organisations are investing in internally developed AI solutions tailored to their specific needs. Over one-third of employees use employer-paid AI tools, reflecting formal adoption of secure and compliant solutions.

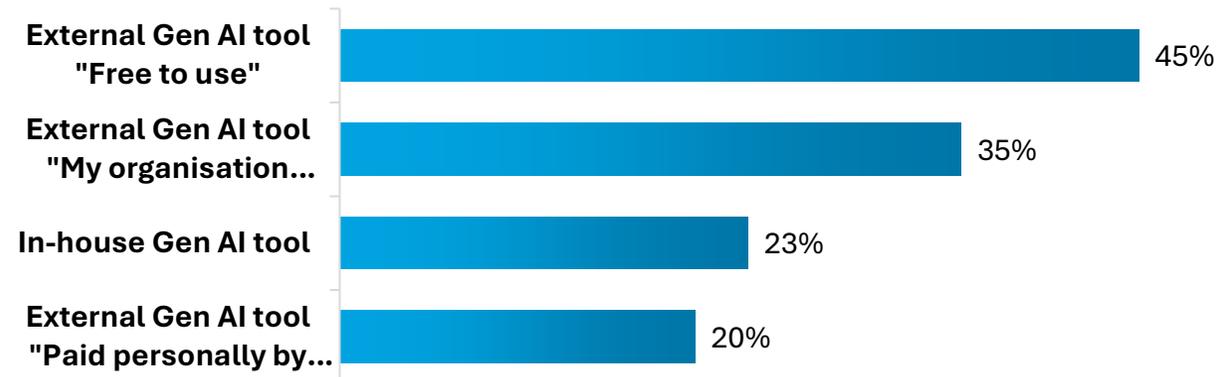
However, a significant majority of employees (65%) still rely on free or self-paid AI tools to address work-related challenges. This highlights a strong perceived personal value in AI tools but also reveals unmet enablement from employers.

Organisational enablement is lagging behind user behaviour, resulting in shadow AI becoming the default mode of adoption and increasing risk exposure for organisations. To address this gap, organisations should implement clear policies and governance frameworks alongside secure, enterprise-grade AI platforms that comply with data protection and regulatory requirements.

Additionally, comprehensive training and effective communication of associated risks at all organisational levels is essential to reduce reliance on unregulated external applications and ensure safer, more controlled AI adoption.



Gen AI at work: Who pays?

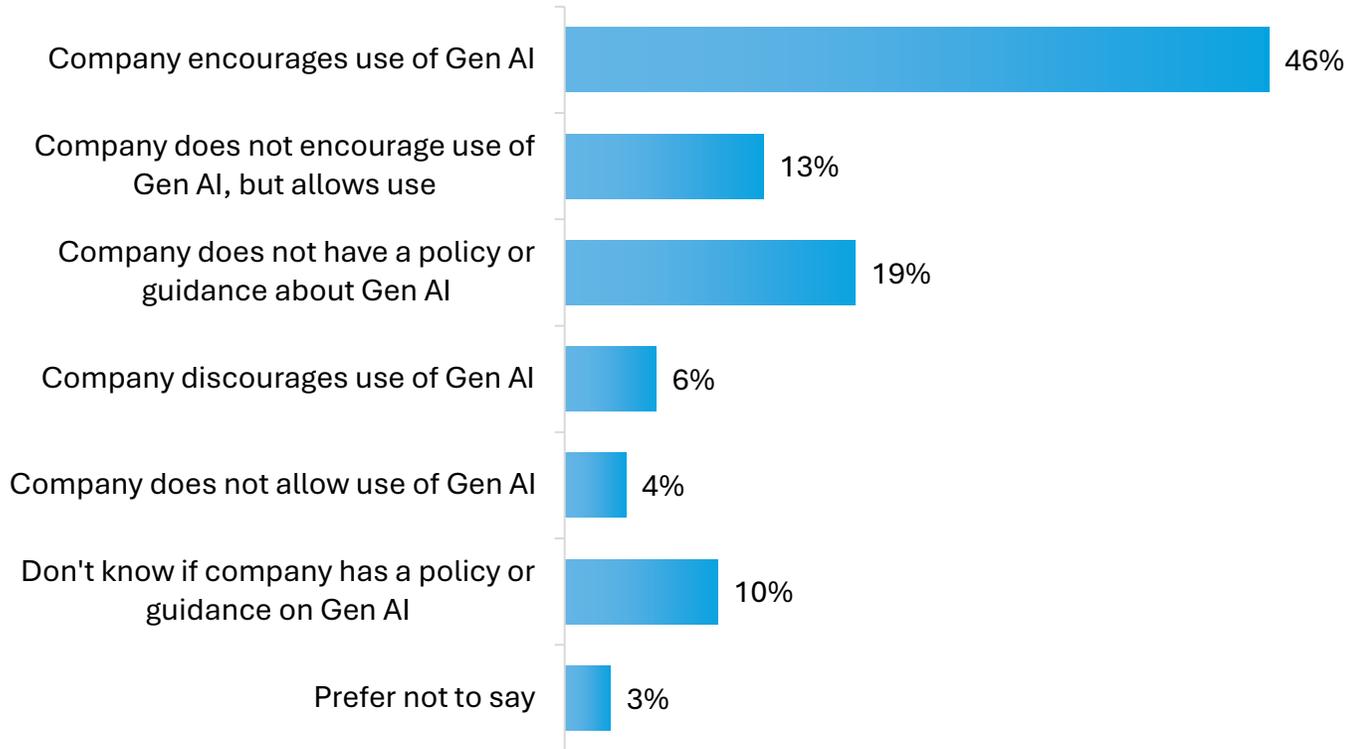


Question: Which of the following purposes have you used any Generative AI for?; Which, if any, of the following statements describe the Generative AI tools you have used for work?

Weighted base: All respondents aged 18-75, 2025 (1,000), who have used a generative AI tool for work, 2025 (267). *Proportion of respondents who Don't know (8%)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

46% of those using Gen AI for work are actively encouraged to do so by their company.



The Generative AI Dilemma: Permission, Prohibition, and Policy Ambiguity

Many employees using Generative AI at work face unclear or inconsistent organisational policies. 13% operate where AI use is allowed but not encouraged. This can lead to uneven adoption and lost productivity. 10% face active discouragement or bans, which may stifle innovation and push shadow AI use.

In 2024, 90% of employees reported a lack of guidance or policies. We have seen a significant improvement in 2025, with 19% of employees reporting a lack of guidance or policies.

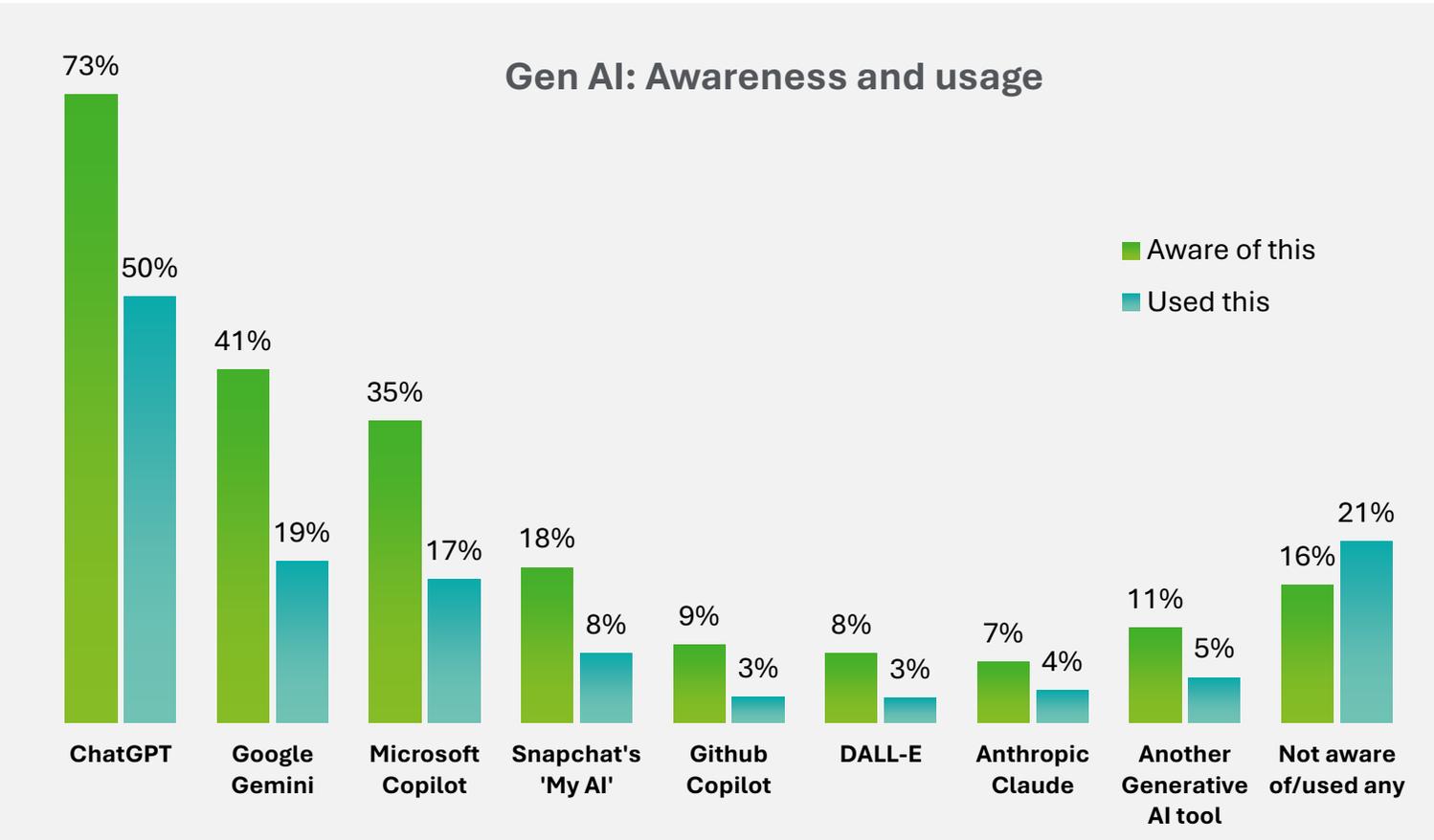
It is important that organisations continue to address this issue to prevent ambiguity and avoid risk.

Question: Which, if any, of the following statements applies to your company about the use of Generative AI tools for work purposes?

Weighted base: All respondents aged 18-75 who have used a generative AI tool for work, 2025 (267)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

ChatGPT is still the most popular Generative AI tool, with over seven in ten adults in Ireland who are aware of it and half who have used it.



ChatGPT leads AI market, while other tools experience modest adoption

ChatGPT dominates the Generative AI landscape, benefiting from strong brand recognition and early adoption, setting user expectations and industry standards.

The presence of multiple AI tools with varying levels of engagement creates potential fragmentation risks within organisations, compounded by the prevalent use of unsanctioned 'shadow AI' solutions.

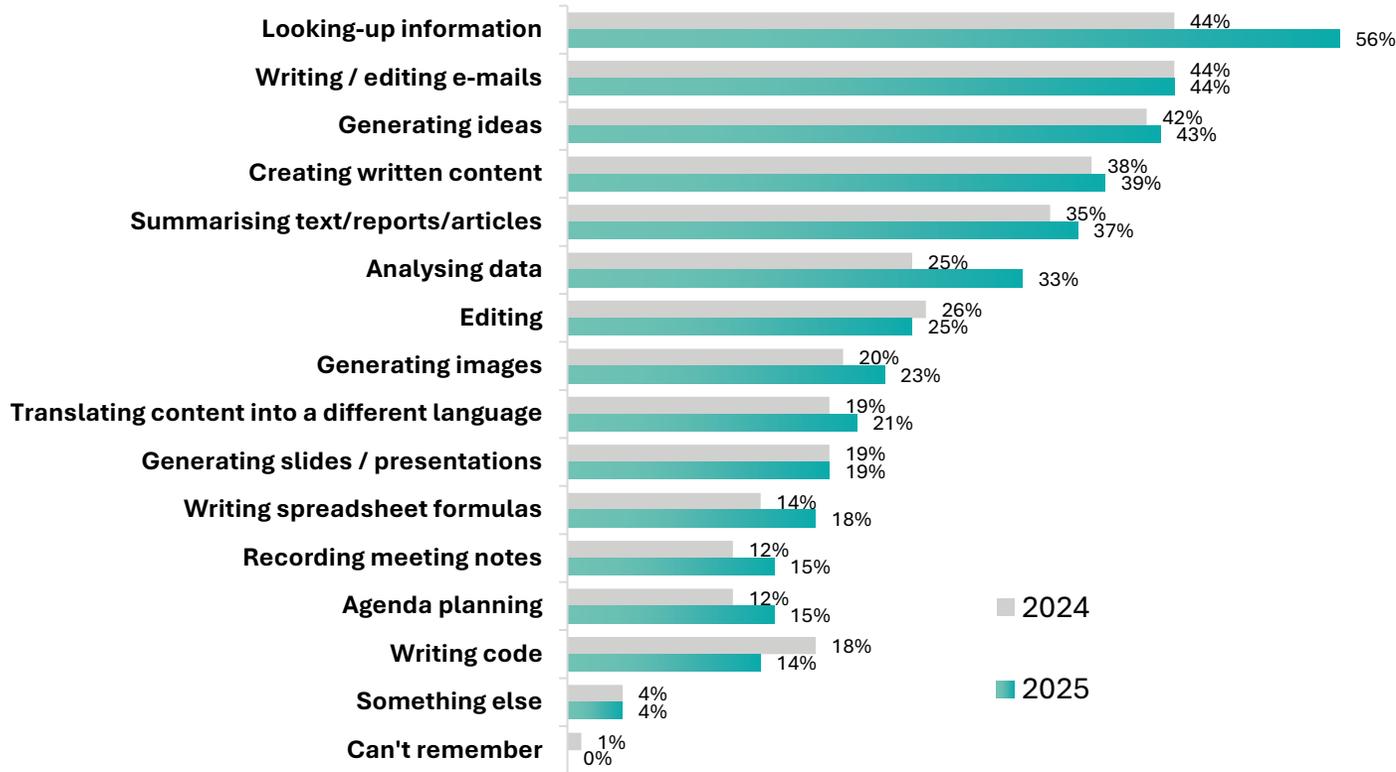
Question: Which, if any, of the following Generative AI tools are you aware of?; Which, if any, Generative AI tools have you used?

Weighted base: All respondents aged 18-75, 2025 (1,000). Respondents who did not know any Gen AI tool were included into not aware, those aware of generative AI, who did not know if they had used it were included into "Aware of Gen AI, not used it".

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Looking-up information is still the most common application of Gen AI for work purposes.

Gen AI: Work tasks



GenAI is currently a language-and-knowledge work multiplier and not yet a deep-technical tool

Employees are increasingly using Generative AI in daily work to enhance productivity and efficiency. The most common applications include looking-up information, writing and editing content, and generating ideas.

This widespread use demonstrates Generative AI’s role as a powerful multiplier for language and knowledge work, driving everyday productivity rather than specialised technical functions. Integrating AI into knowledge management and communication workflows will accelerate decision-making, boost collaboration, and improve operational efficiency.

Organisations should explore and invest in advanced technical AI applications, including agentic AI, as these technologies have the potential to autonomously perform complex tasks and significantly enhance operational efficiencies across various functions within organisations.

Question: Which of the following work tasks have you used any generative AI tools for?
 Weighted base: All respondents aged 18-75 who have used generative AI for work, 2024 (170), 2025 (267)
 Source: Deloitte Digital Consumer Trends, Ireland, November 2025

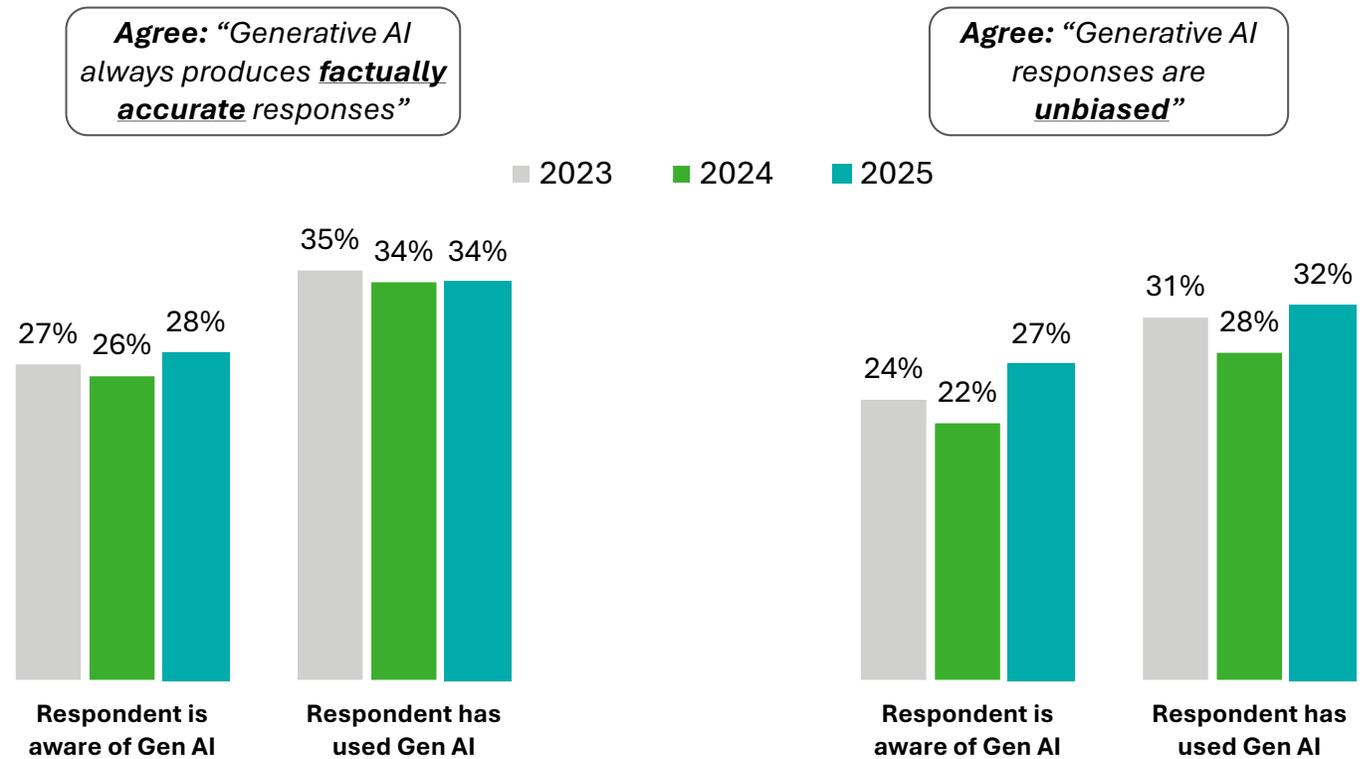
Overall, the proportion of those who think that Gen AI produces factually accurate responses is stable year on year, though a higher proportion of those aware think that Gen AI responses are unbiased.

Despite growing use of Generative AI, around 28% of consumers believe its outputs are always accurate, and just 27% see them as unbiased, revealing ongoing trust challenges.

While trust in Generative AI is increasing, verification behaviors are not keeping pace, creating a risk that some users may over-rely on AI outputs without sufficient fact-checking. This paradox means that although only a minority fully trusts AI accuracy, those who do may fail to critically evaluate outputs, potentially accepting inaccurate or biased information. Such over-trust can lead to poor decision-making, misinformation, and reputational risks for organisations.

Organisations must prioritise training employees to critically evaluate AI-generated content, implement strong governance to address bias, and embed verification practices into workflows to promote responsible and reliable AI use.

Gen AI: Awareness of flaws



Question: To what extent do you agree or disagree with the following statements?

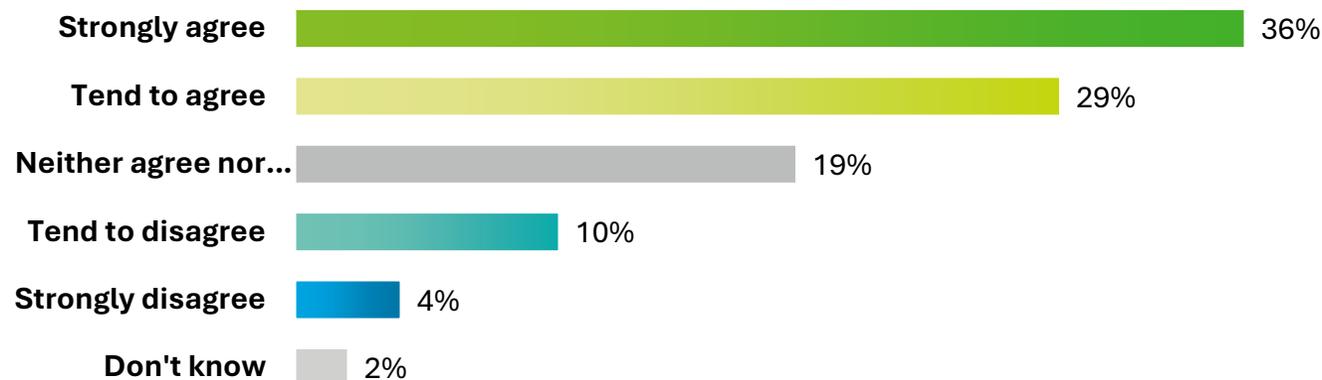
Weighted base: All respondents aged 18-75, 2023/2024/2025 (1,000/1,000/1,000), who are aware of any generative AI tool (621/731/844), who have used any generative AI tool (336/476/637)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Consumers remain hesitant about using Gen AI-based customer services, with almost two-thirds agreeing they would be less inclined to use it if conversing with a Gen-AI assistant.

“I would be
**less inclined to use
 customer services**
 if I knew I was conversing with a
 Generative AI assistant”

Gen AI: Customer services (among those aware of Gen AI)



Findings reveal, 65% of consumers are less inclined to use a service if they knew they were interacting with a Generative AI assistant, challenging AI adoption in customer services. This hesitancy could stem from concerns about authenticity, empathy, accuracy, and data privacy. Organisations must manage how AI is integrated into customer experiences to avoid alienating users and undermining brand trust.

Delivering seamless experiences that complement human interaction is essential to maintain trust, while investing in strong ethical standards and data privacy protections will reassure customers. Combining transparency, value, and human oversight will help build confidence and encourage wider acceptance of AI services. Clear communication and proactive engagement are key to bridging the gap between technology and consumer trust.

Question: To what extent do you agree or disagree with the following statements?

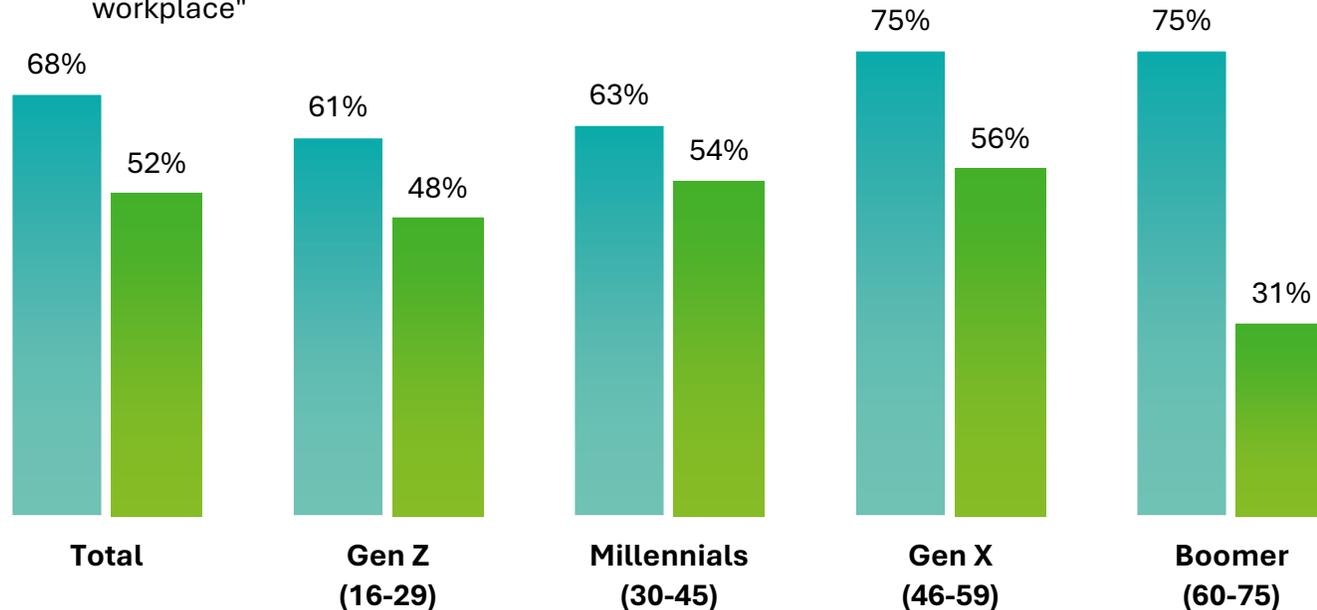
Weighted base: All respondents aged 18-75, 2025, who are aware of any generative AI tool (844)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

In general, people are more likely to believe Gen AI will displace human work – but not their role.

Gen AI: Views on future of work (among those aware of Gen AI)

- Agree that “Generative AI will reduce the number of jobs available in the future”
- Agree that "I am concerned that in the future generative AI will replace some of my role in the workplace"



Over two-thirds of consumers worry that Generative AI will reduce the number of jobs overall.

A notable paradox exists: Boomers show high concern about job displacement at a macro level but relatively low personal fear, likely due to their proximity to retirement. Millennials exhibit closer alignment between macro and personal concerns (63% vs. 54%).

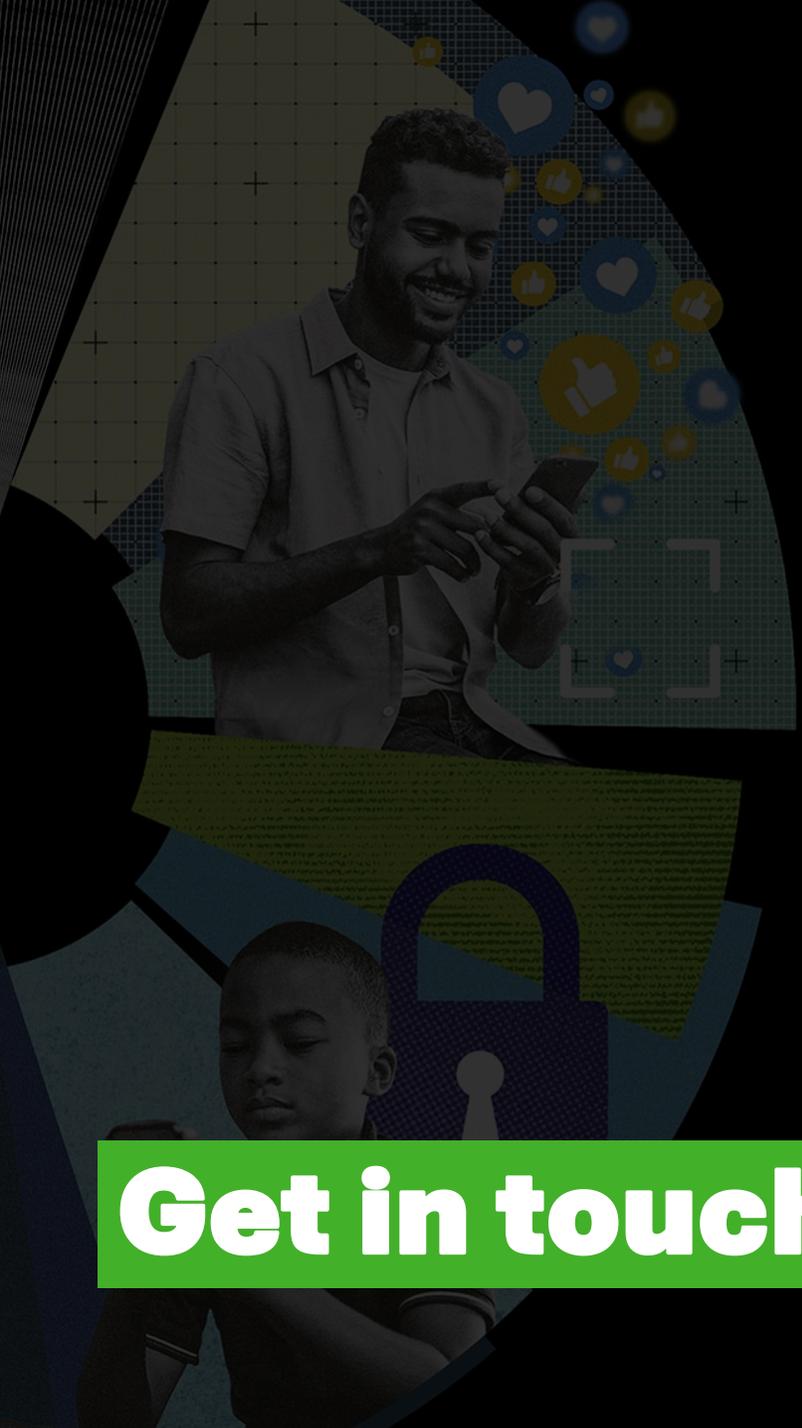
This “optimism gap,” where individuals anticipate broad job disruption but perceive less personal impact, presents a critical change-management challenge. Organisations must provide clear narratives on how work will evolve and what support will be offered.

To overcome resistance and fear, companies must emphasise AI as a tool for augmentation, offer transparent communication, and establish reskilling and upskilling programmes that empower employees, fostering trust and accelerating responsible AI adoption.

Question: To what extent do you agree or disagree with the following statements?

Weighted base: All respondents aged 18-75, 2025, who are aware of any generative AI tool (844), working and aware of any generative AI tool (612)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025



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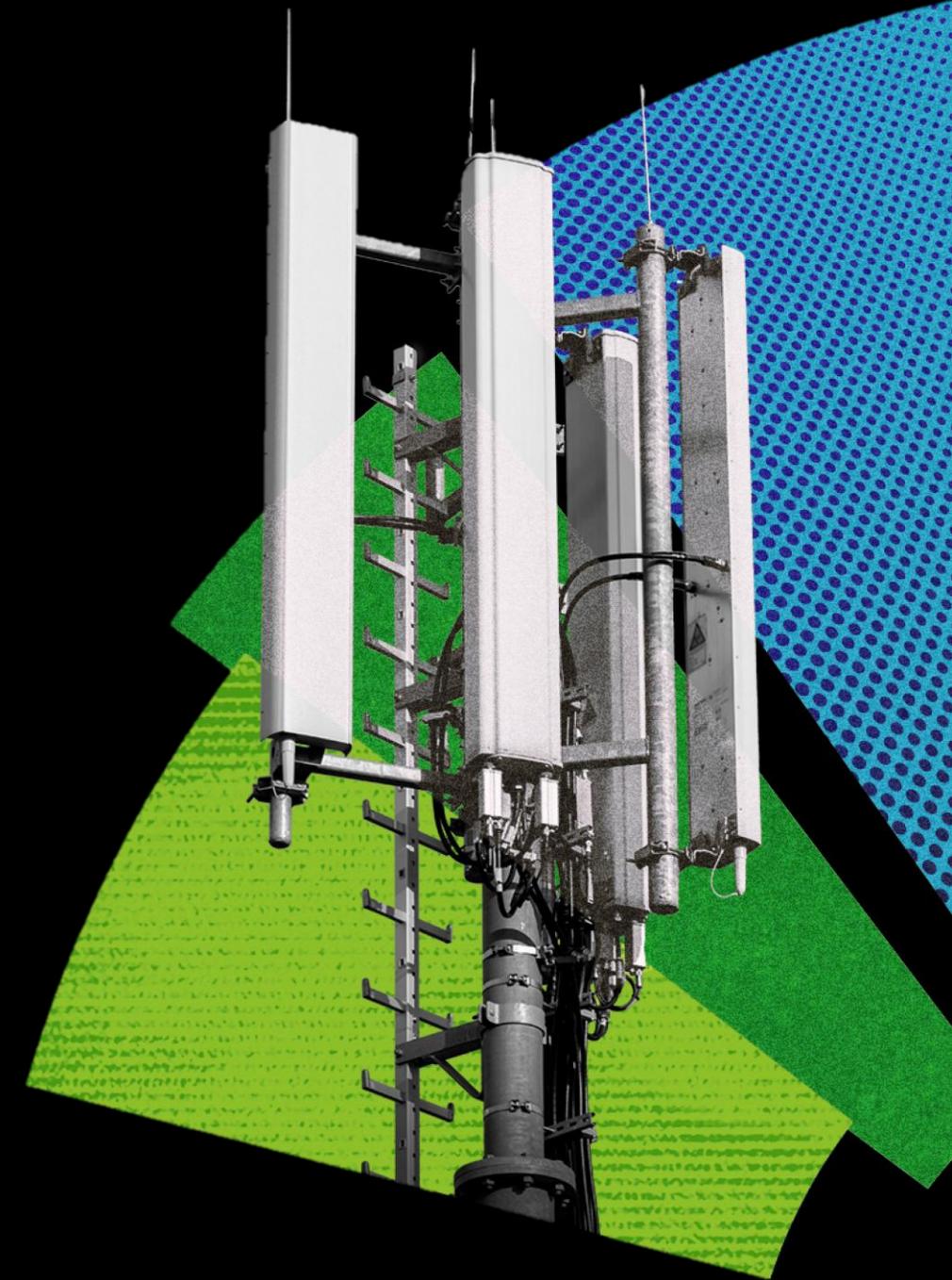
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Telecommunications and Infrastructure

Digital Consumer Trends 2026, Ireland Edition



Key Takeaways



Multi Technology Approach becoming essential

Home broadband remains the dominant choice for internet access.

- Mobile alternatives are rapidly expanding, with home broadband still used by 67% of customers, highlighting strong potential for fixed-mobile convergence to drive bundling and retention.

Key take away: Strategic investment in both fixed and mobile technologies is essential for operators to remain competitive.



Market is highly competitive

Top 4 providers Eir, Vodafone, Sky Ireland and Virgin Media dominate market with 83% share.

- Eir leads the market share at 27% with other main providers closely behind

Key take away: Smaller players must exploit geographic or service gaps, while incumbents require sustained investment to maintain competitive positioning.



Bundling is now a widespread theme

Bundling remains a key strategy for enhancing customer value and loyalty.

- TV, landline, and video subscriptions are the most common bundled items, with 53% of home broadband users combining services.

Key take away: Despite low adoption of emerging services such as Wi-Fi boosters (9%) and music subscriptions (3%), significant cross-sell opportunities remain untapped in these areas.



Quality perception is stable; differentiation is critical

Majority of consumers have not experienced any change in mobile network quality over the past year. In the current competitive landscape, quality alone will not separate providers.

- 58% of Irish mobile users have not experienced any change in network quality.

Key take away: Customer experience, coverage consistency and other factors beyond pure speed becoming increasingly prevalent



5G ability not yet meeting consistency

5G adoption is growing rapidly among consumers.

- Currently, 65% of consumers have 5G on their phones, yet 29% experience it less than half the time.

Key take away: As technology improves and becomes more widespread, user expectations surpass network deployment. Infrastructure investment should focus on coverage density along with capability.



Improved coverage and rewards are key switching drivers

Coverage quality and loyalty programmes are key drivers of customer switching.

- Specifically, 37% cite coverage as their primary switching motivator, while 35% are influenced by loyalty programmes.

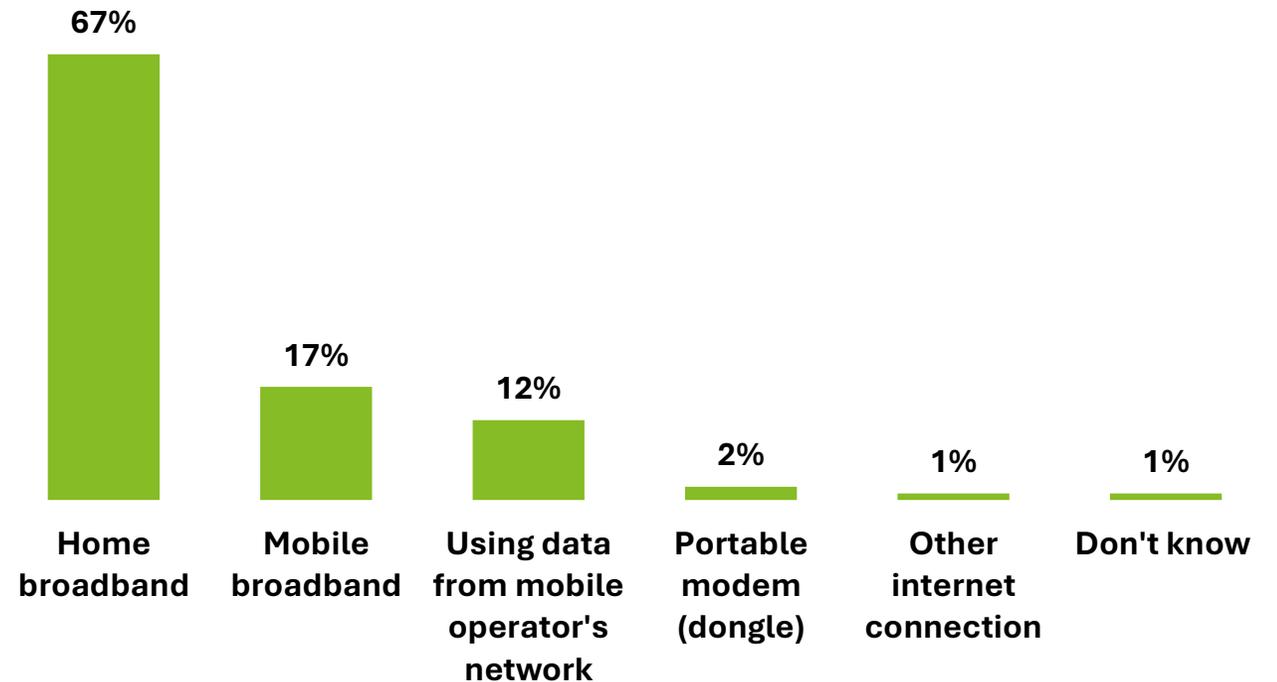
Key take away: With 17% of customers showing strong trust and no intention to switch, retention strategies should prioritise addressing coverage gaps and proactively rewarding loyalty.

Home broadband is the most popular type of connection in Ireland. Using data from a mobile operator network is popular amongst 12% of adults.

Home broadband remains the primary internet connection for two-thirds (67%) of Irish households, supported by government infrastructure investment through the National Broadband Plan. However, mobile-based alternatives—including mobile broadband (17%) and data from mobile operators' networks (12%) , represent a meaningful segment, suggesting potential consumer interest in flexibility.

For telecommunications providers, this data highlights the importance of a multi-technology strategy. While defending home broadband market share remains critical amid government rollout expansion, operators must also develop competitive mobile-first offerings to capture the growing segment prioritizing flexibility over traditional fixed connections.

Main connection at home

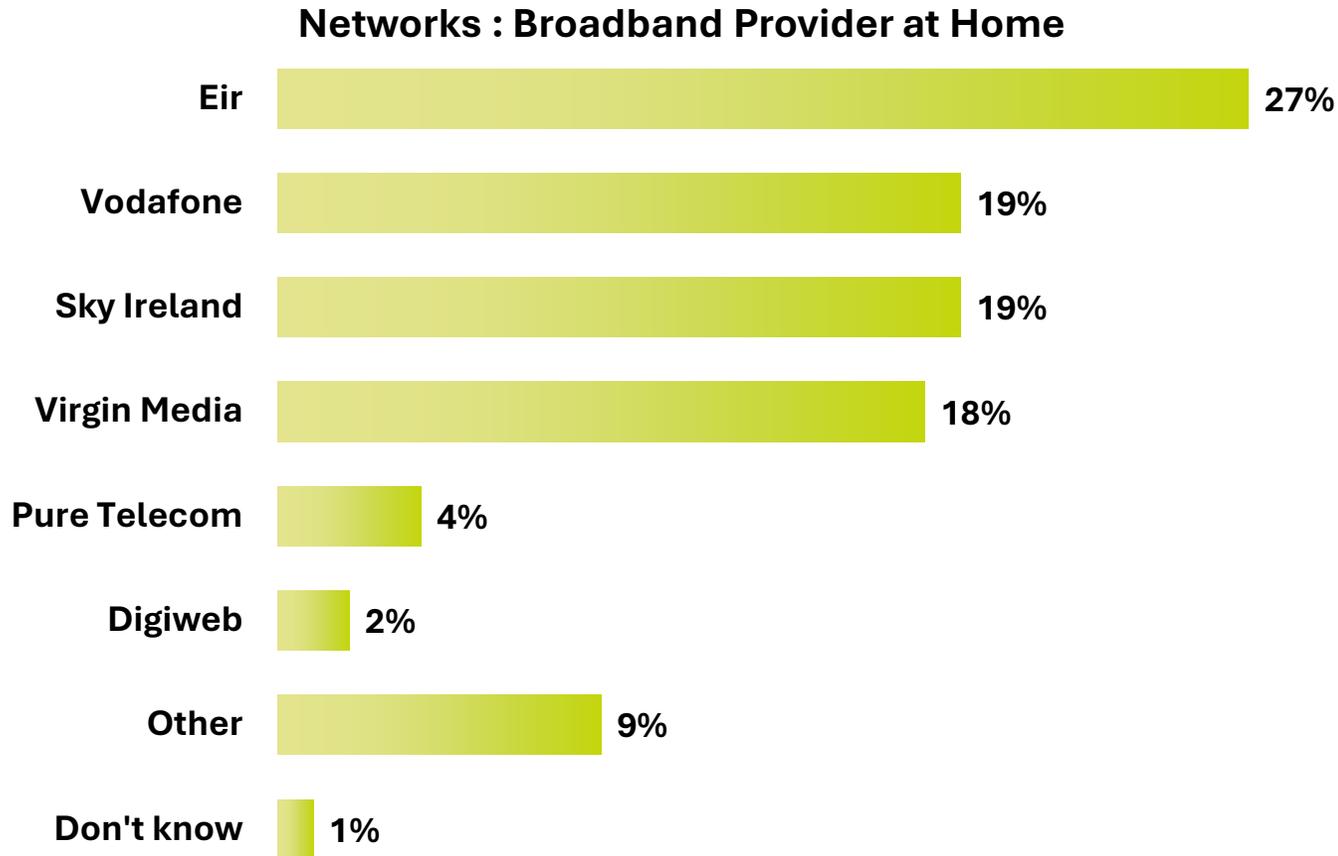


Question: Which, if any, of the following types of internet or home broadband connection is the MAIN one you use in your household?

Weighted base: All respondents aged 18-75, 2025 (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Eir is the leader, followed by Vodafone, Virgin Media and Sky Ireland.



Eir leads the Irish home broadband market with 27% share, followed closely by Vodafone, Sky Ireland, and Virgin Media - each holding 19%, 19%, and 18% respectively. This near-parity among the top four providers (83% combined) reflects a highly competitive landscape where bundling and service quality have become critical differentiators.

With continued investment in network infrastructure and customer experience, we can expect further consolidation or differentiation. Smaller players must exploit geographic or service gaps, while incumbents require sustained investment to maintain competitive positioning.

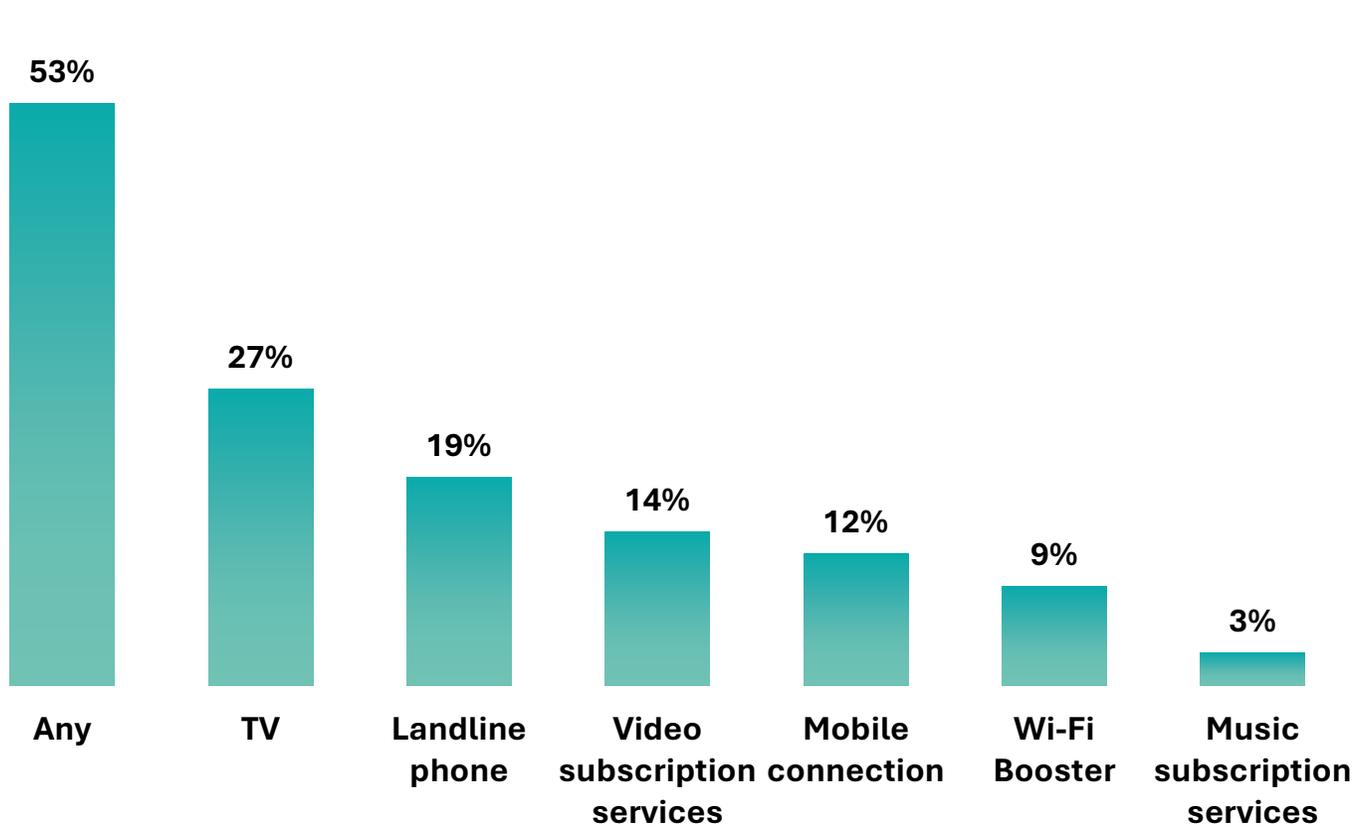
Question: Which, if any, of the following currently provides your broadband at home?

Weighted base: All respondents aged 18-75, who have internet access at home (half sample - sample A), 2025 (418)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

More than half (53%) of those who have a home broadband say it is bundled with other services, with TV being the most common service.

Bundled with broadband



TV bundling leads at 27%, followed by landline (19%), subscriptions (14%), and mobile connectivity (12%). The low adoption of emerging services (Wi-Fi boosters 9%, music 3%) reveals significant cross-sell opportunity.

Operators may invest in developing dynamic bundling strategies that evolve with digital service adoption, particularly as traditional TV consumption declines.

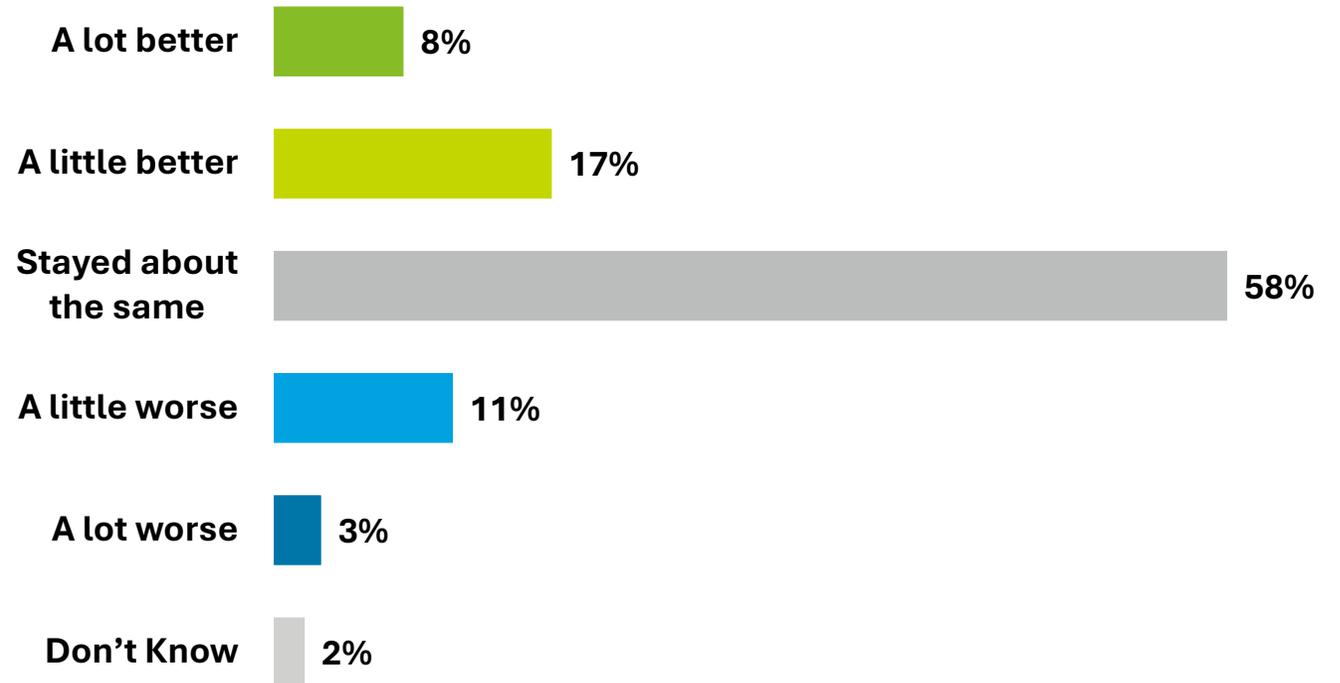
Question: Is your broadband service at home bundled with any of the following?
Weighted base: All respondents aged 18-75, who have home broadband, 2025 (666)
Source: Deloitte Digital Consumer Trends, Ireland, November 2025

On balance, perception of mobile network quality has changed little over the last year. About six in ten adults (58%) say it stayed the same; more think it has improved (25%) than declined (14%).

Over the past 12 months, 58% of Irish mobile users have reported no change in their network quality, while 25% have noticed improvements and 14% have experienced a decline. This suggests that recent investments have largely maintained service levels with some incremental enhancements but have yet to create a widespread perception of significant improvement.

In a competitive market, network quality alone may no longer serve as a key differentiator for operators. Greater emphasis should be placed on effectively communicating network upgrades, particularly around 5G capabilities and addressing the 14% of users experiencing deteriorations through targeted infrastructure investments in congested areas.

Mobile network: Perceived quality in the past 12 months



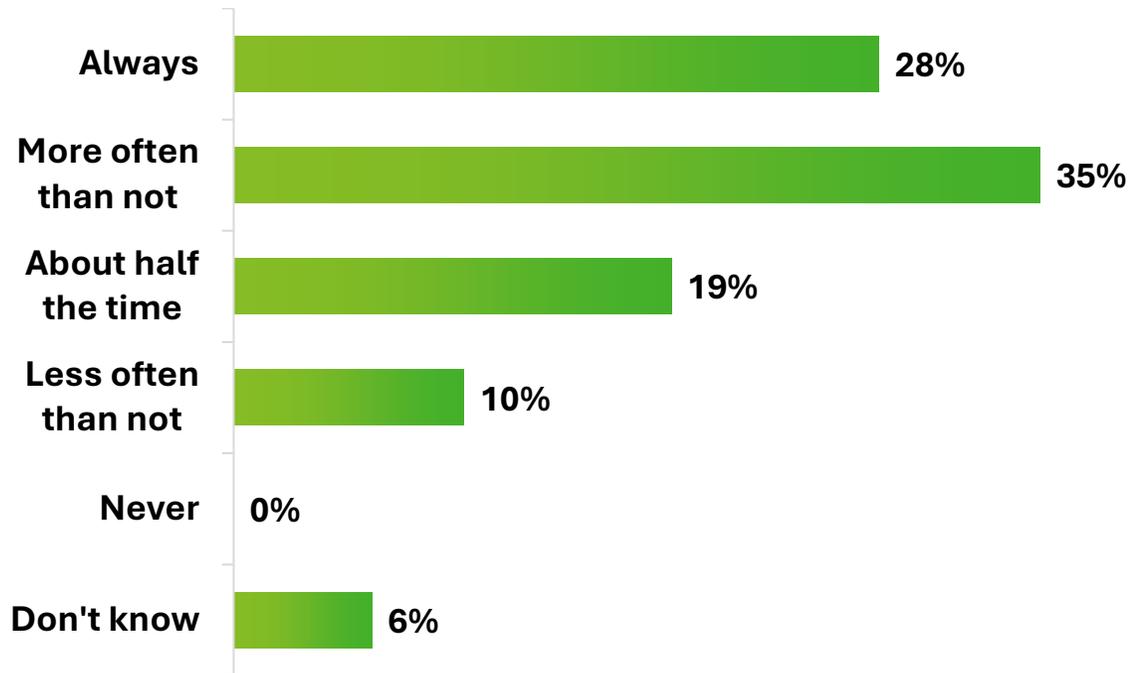
Question: Over the past 12 months, would you say that the quality of your mobile internet service has got better or worse, or has it stayed about the same?

Weighted base: All respondents aged 18-75 who have a phone or smartphone, 2025 (968)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

The majority of 5G users claim to consistently get 5G signal while on mobile

How often 5G network users actually get 5G



Two-thirds (65%) of Irish smartphone users report having 5G capability on their primary device, indicating rapid adoption of the technology. However, the actual 5G coverage experience presents a more nuanced picture: while 63% of 5G-capable users access 5G “always” or “more often than not,” 29% experience it “about half the time” or less. This highlights a significant gap between network availability and consistent user experience.

This discrepancy suggests that although operators have rolled out 5G infrastructure, network capacity and geographic coverage remain uneven. Users in urban areas are likely to enjoy reliable 5G connectivity, whereas those in suburban or rural areas may frequently fall back on 4G networks.

65%

say they have 5G network on their main phone

Question: Thinking of occasions when you use your mobile operator's network (e.g. 3G/4G/5G, etc.) on your main phone, not Wi-Fi. How often, if at all, do you get 5G network coverage?

Weighted base: All respondents aged 18-75, who have a phone or smartphone, 2025 (968), who have 5G on their main phone, 2025 (630)

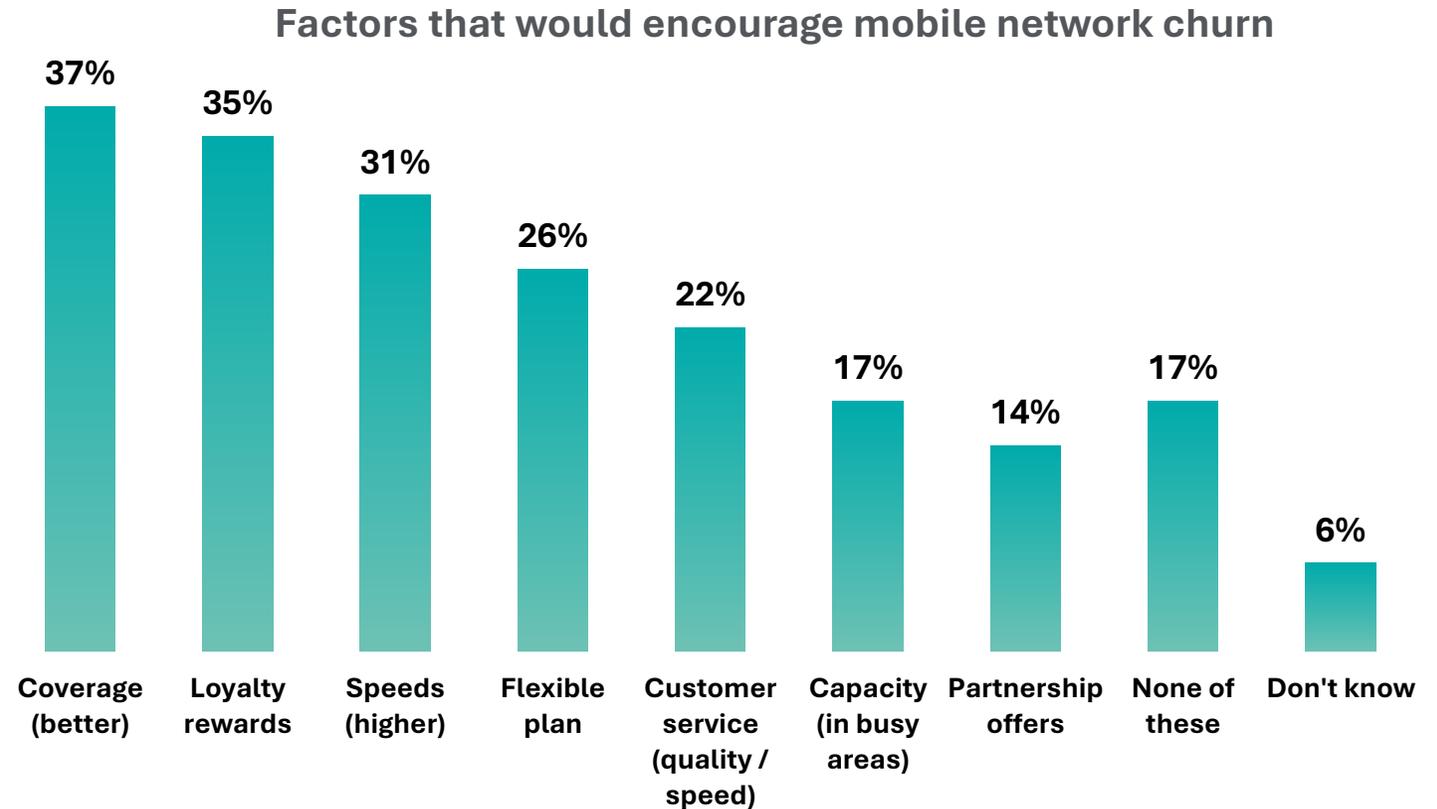
Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Coverage is the top motivation that would encourage changing mobile network, followed by loyalty rewards. Higher speed is the third highest driver.

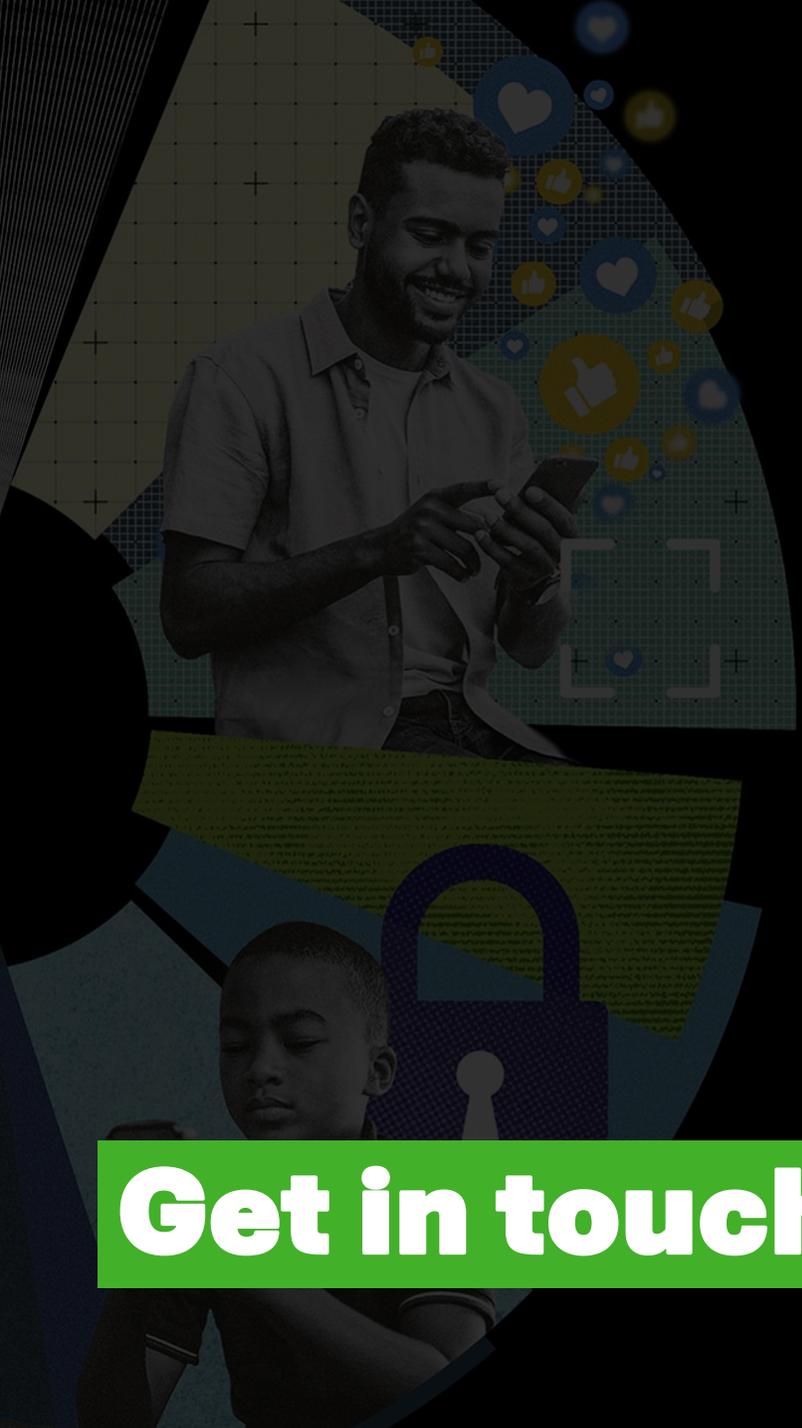
Coverage quality (37%) and loyalty programmes (35%) are the primary drivers of customer switching, whereas customer service (22%) and brand partnerships (14%) have a lesser influence. Meanwhile, 17% of customers remain unmoved, representing a segment of highly loyal or satisfied individuals who are less sensitive to price and more valuable over the long term.

As customer expectations rise (particularly regarding security, resilience, and transparency around service outages) factors such as trust and omnichannel service quality are likely to become increasingly significant in influencing switching behaviour, extending beyond traditional coverage considerations.

By investing strategically in coverage expansion, innovating loyalty programmes, and emphasising security and compliance, companies can not only attract customers from competitors but also enhance retention among their own high-value customers.



Question: Which, if any, of the following would encourage you to switch mobile network provider?
 Weighted base: All respondents 18-75 who have a phone or smartphone 2025 (968)
 Source: Deloitte Digital Consumer Trends, Ireland, November 2025



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Digital Usage and Entertainment

Digital Consumer Trends 2026, Ireland Edition



Key Takeaways



Evolving Smartphone Trends

Smartphone use continues to evolve as a central part of Ireland's digital landscape, with high adoption and expanding functionality across the population.

- 95% of adults own a smartphone, demonstrating widespread reliance beyond traditional calling.
- 47% regularly use their smartphones or smartwatches for in-person payments, signalling growing acceptance of mobile financial services.
- 32% of respondents show interest in integrating digital IDs, such as passports or driving licenses, into their devices, indicating cautious but increasing openness to digital identity solutions.

Digital Wellbeing & Usage Patterns

Smartphone usage remains deeply embedded in daily life, with widespread adoption across all age groups. However, concerns about the amount of time spent on devices and its impact on wellbeing are increasingly prominent, especially among younger generations.

- 70% wish they spent less time on devices, rising to 76% for women; Gen Z and Millennials express the most concern.
- Gen Z move fast through social media platforms: 46% of them have joined a social media app in the last year, though 32% have deleted one.
- 34% of respondents check their phone at least 50 times daily, with 15% checking 100+ times. This highlights the potential impact usage can have on people's social interactions and sleep patterns.

Subscription & Content Trends

Subscription video-on-demand (SVOD) services have become a staple of modern entertainment, with many consumers accessing content through smart TVs.

- Access to paid digital subscriptions remains steady at 74%, with Netflix leading. Access is lowest (54%) among Baby Boomers, who prefer free-to-air or traditional TV services.
- Smart TV ownership correlates with subscription access, which has plateaued since the COVID spike, indicating market maturity.

Attitudes & Regulations

Concerns about youth and digital exposure is becoming increasingly visible on a global scale.

- Overall, 81% would support social media platforms requiring an age verification method when registering, and 82% would support a form of usage limitations for under 18s.
- 70% support banning social media for under-16s.
- 59% of respondents believe that the acceptable age for an individual to be given their first smartphone for personal use is between the ages of 12 and 15 years old.

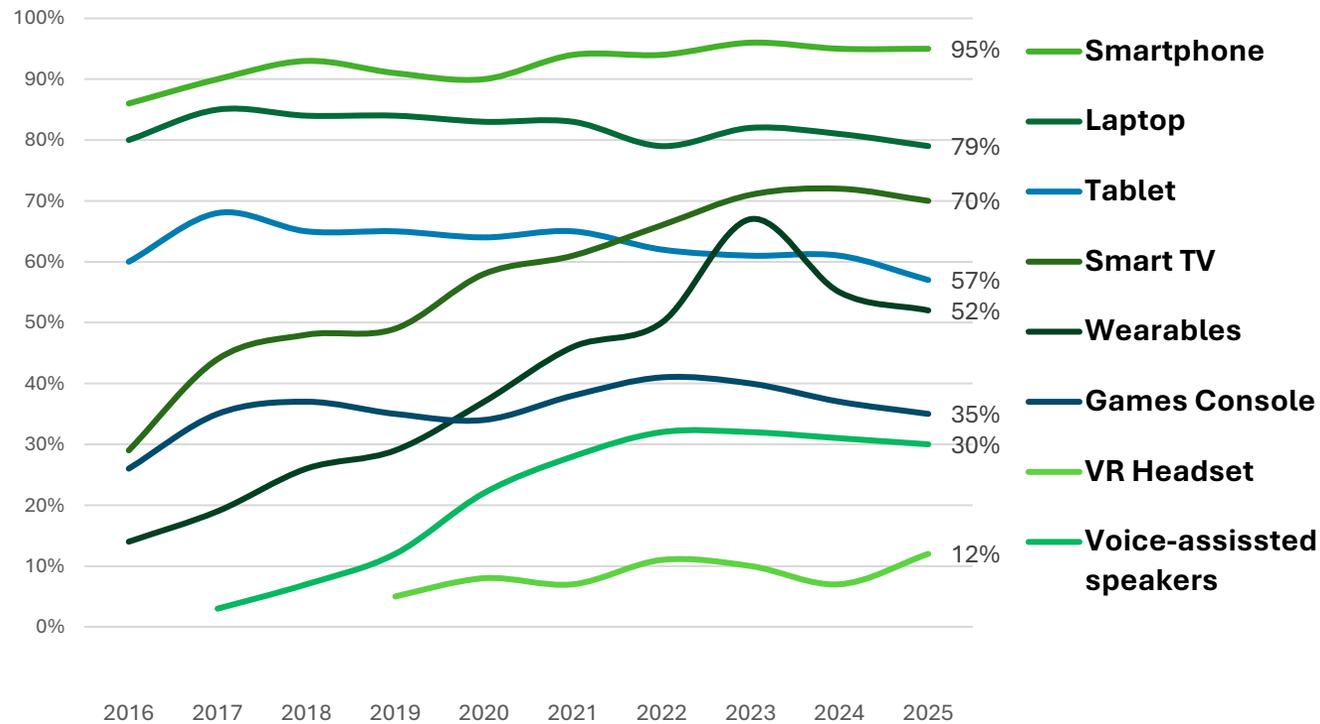
News & Misinformation

In the last 12 months, 59% of respondents report having seen misinformation more regularly, this compares to 53% in 2024 and 46% in 2023.

- 22% of respondents reported deleting an app because it provided misinformation.
- Overall, TV (54%) remains the preferred source of news content, but there are significant variations by generation cohorts. Nearly half of Gen Z (47%) cite social media as their main news source and Millennials at 42%.

Access to devices is stable across key metrics and most commonly owned devices in Ireland, which is likely to persist in the short term. Wearables continue to record a slight dip.

Devices: Adoption



Smartphone access has stabilised, solidifying its position as an essential device, outperforming declining ownership of laptops and tablets as they increasingly meet productivity and entertainment needs.

Smart TV ownership has also levelled off, with a slight decrease in 2025, while daily usage remains strong at 83%.

Although overall device ownership has remained steady in recent years, wearables have seen a notable decline. Gaming console ownership has also decreased, reflecting a slowdown in major new releases. In contrast, VR headsets are gaining popularity, with penetration rising to 12% in 2025.

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

Weighted base: All respondents aged 18-75, 2016 (1,000), 2017 (1,000), 2018 (1,000), 2019 (1,000), 2020 (1,000), 2021 (1,000), 2022 (1,000), 2023 (1,000), 2024 (1,000), 2025 (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, 2016-2025

Daily usage rate – a measure of utility – varies markedly by device, with the smartphone remaining the leader by this metric.

Devices: Daily usage



Question: When was the last time you used any of these devices. Was it within the...? [Last day]

Weighted base: All respondents aged 18-75, 2025, with a smartphone (945), laptop (788), smart watch (365), smart TV (702), Games console (353), VR headset (116)

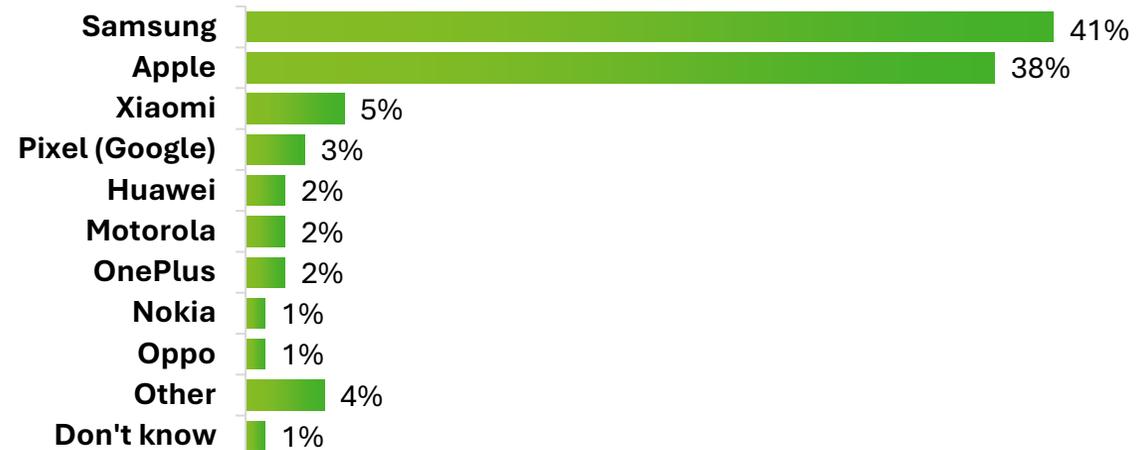
Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Samsung is the market leader in Ireland with Apple as a strong second.

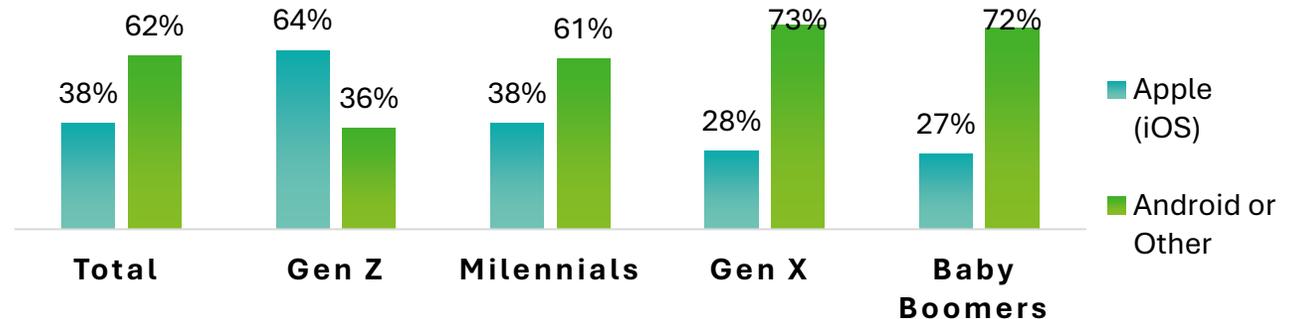
Samsung continues to hold its position as the most popular smartphone brand overall, holding a 41% share in 2025, a slight decrease from 42% in 2024. Apple maintains a consistent 38% share, unchanged from both 2023 and 2024.

Notably, Apple continues to be the preferred brand among the Gen Z demographic, while Samsung leads in popularity among Gen X and Baby Boomer groups.

Devices: Brand of current mobile device



Devices: Apple (iOS) vs Android

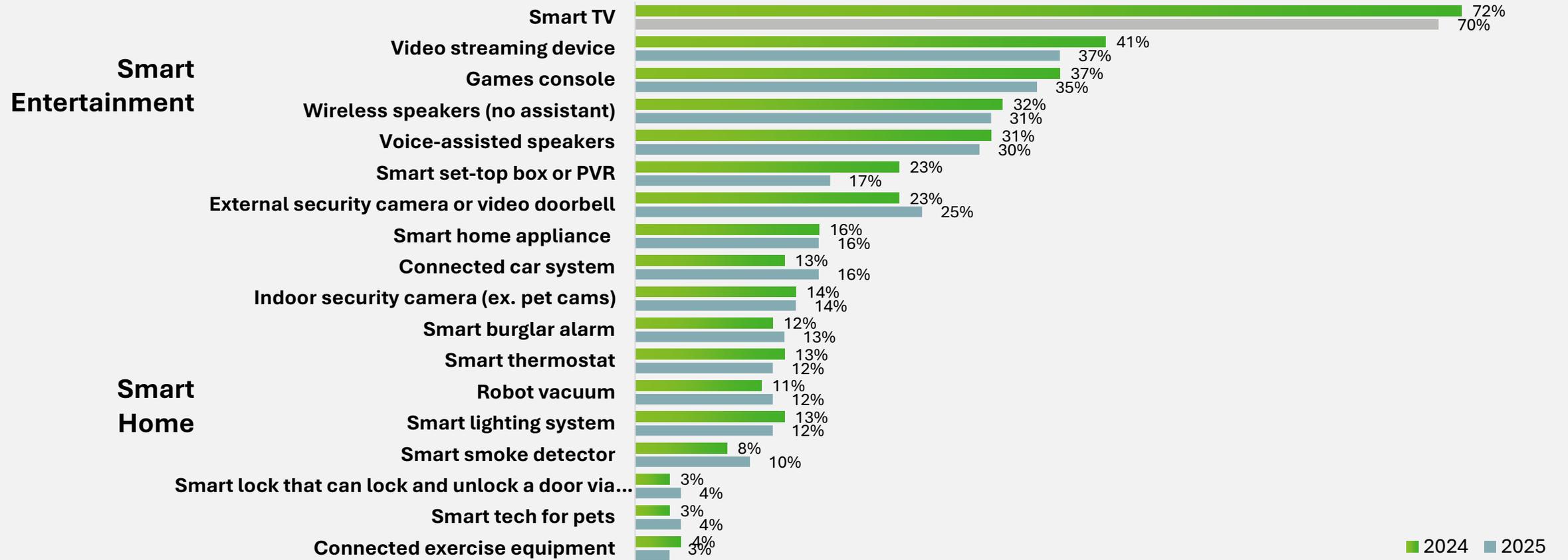


Question: Thinking about your main phone, what is the brand of your current handset?
 Weighted base: All respondents aged 18-75 who have a phone or smartphone, 2025 (968), Gen Z (183), Millennials (330), Gen X (261), Baby Boomer (193)
 Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Question: Thinking about your main phone, what is the brand of your current handset?
 Weighted base: All respondents aged 18-75, who have a phone or smartphone, 2025 (968)
 Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Smart home adoption continues to grow slowly.

Devices: Adoption of smart entertainment and smart home



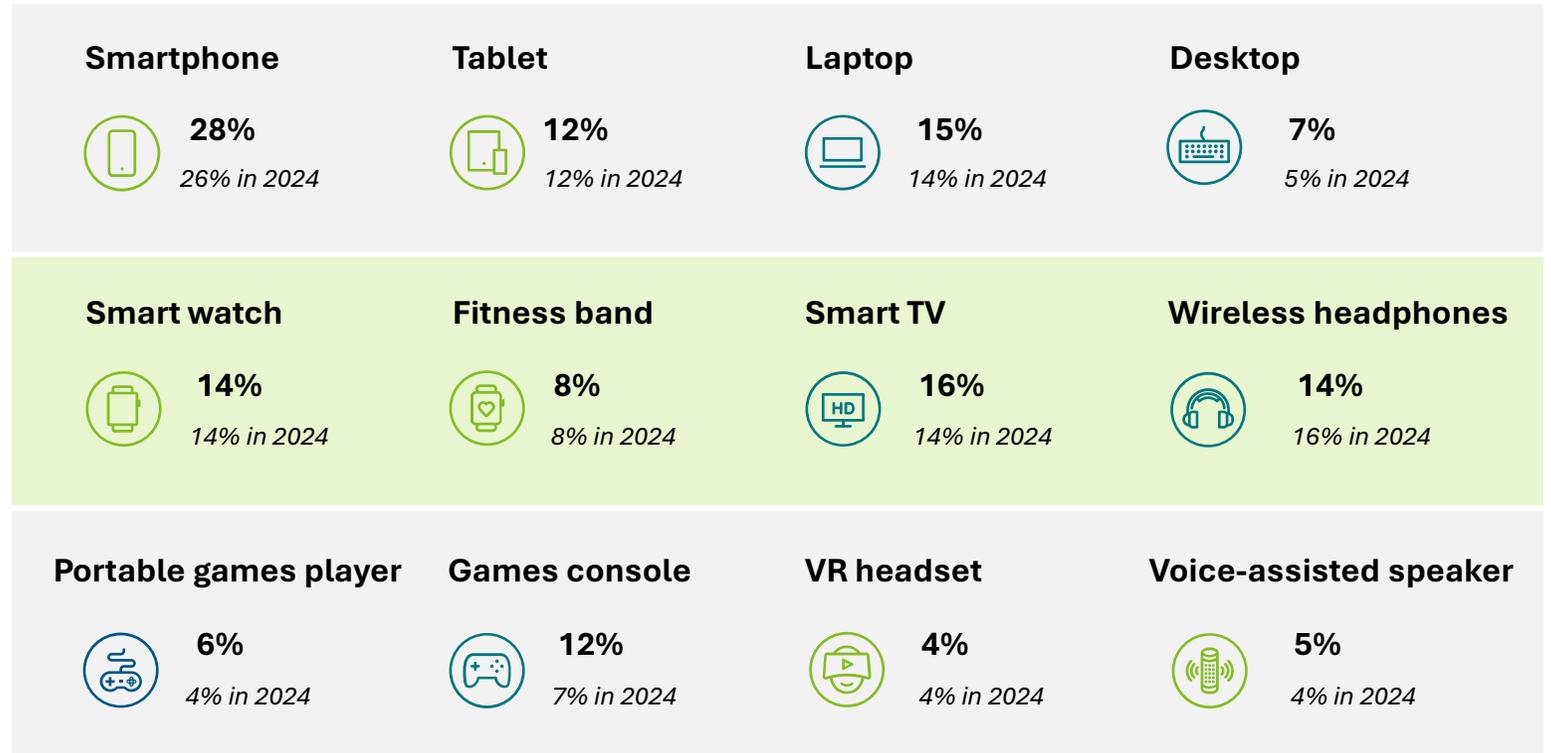
Question: Which, if any, of the following connected devices do you own or have ready access to?
 Weighted base: All respondents aged 18-75, 2024 (1,000), 2025 (1,000)
 Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Purchase intent across devices is stable year on year. Over a quarter of consumers (27%) do not plan to purchase a device in the next year.

28% of respondents are planning to purchase a smartphone within the next 12 months, which is the highest proportion among all device categories.

We continue to observe a low percentage of consumers planning to purchase smartphones. This trend prompts considerations around whether recent innovations in smartphones are truly engaging the market or if they are perceived as more incremental improvements rather than groundbreaking advancements.

Devices: Planned purchase in next twelve months

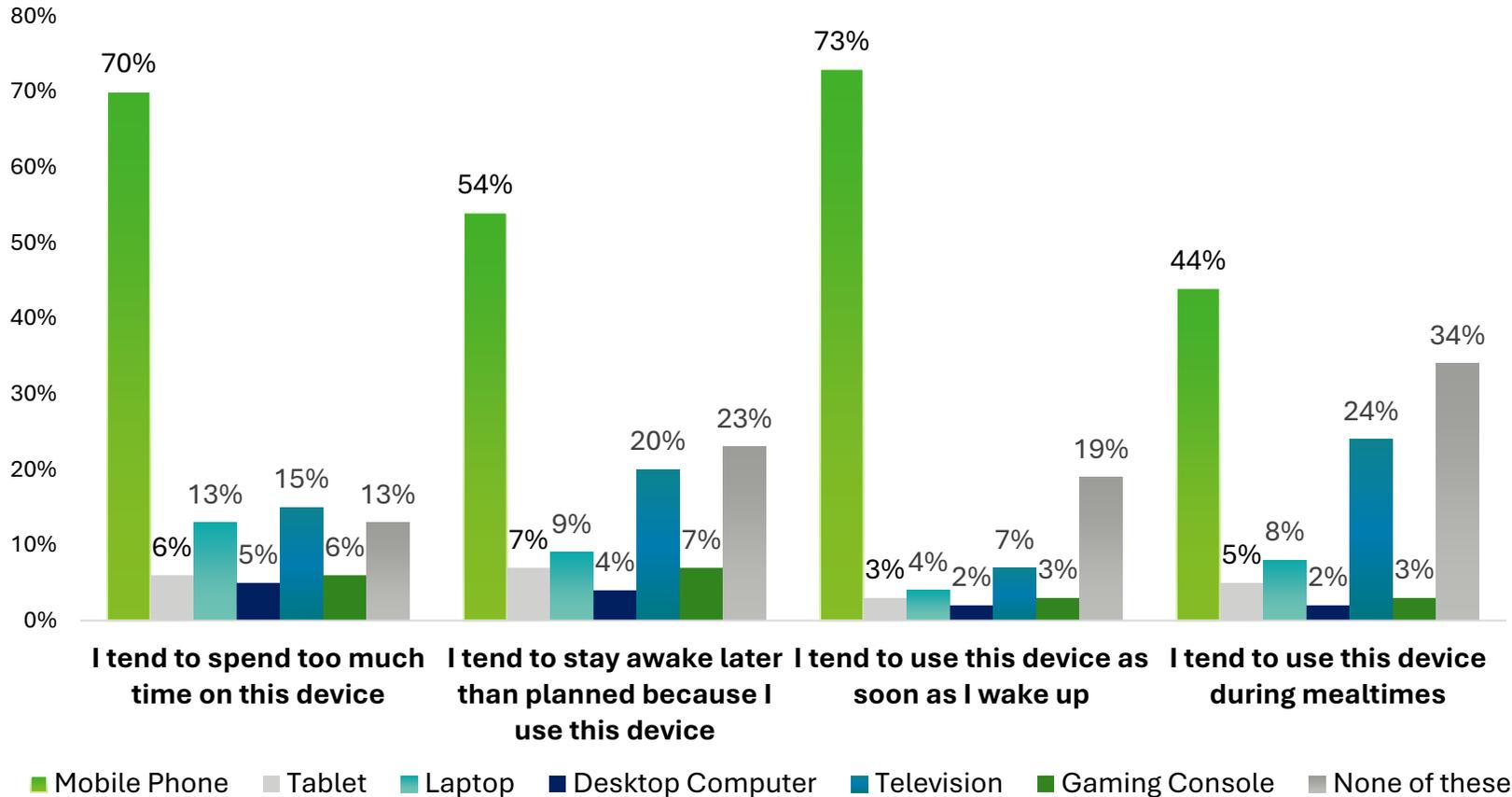


Question: Which, if any, of the following devices do you intend to purchase in the next 12 months?

Weighted base: All respondents aged 18-75, 2024 (1,000), 2025, (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Device use: Three quarters (73%) of adults use their phone as soon as they wake up. 70% state they tend to spend too much time on their mobile phone.



Nearly three-quarters of respondents use their smartphone immediately upon waking, with usage slightly higher among women than men.

More than half (54%) stay awake later than planned using their mobile phone.

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

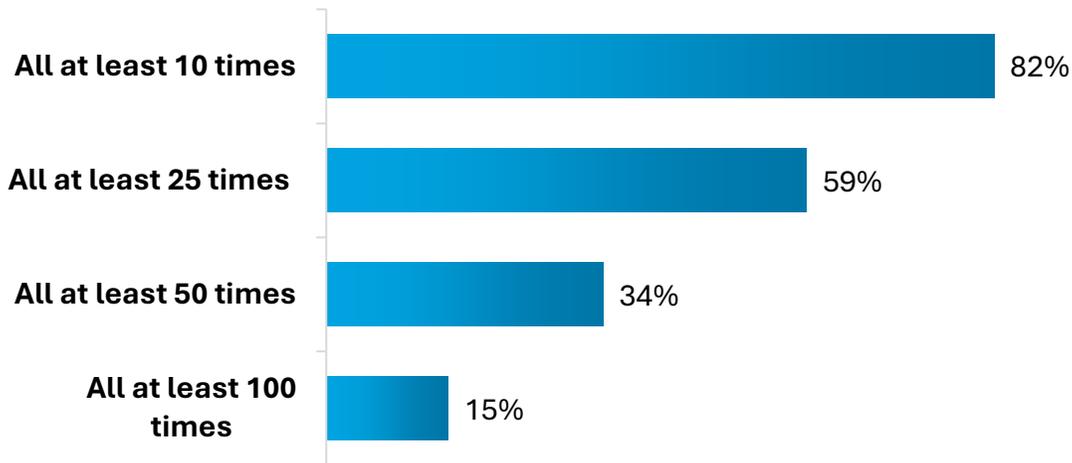
Weighted base: All respondents aged 18-75, 2024 (1,000), 2025 (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Device use: 60% of phone owners look at their phone within 15 minutes or less after waking up down from 65% in the prior year.

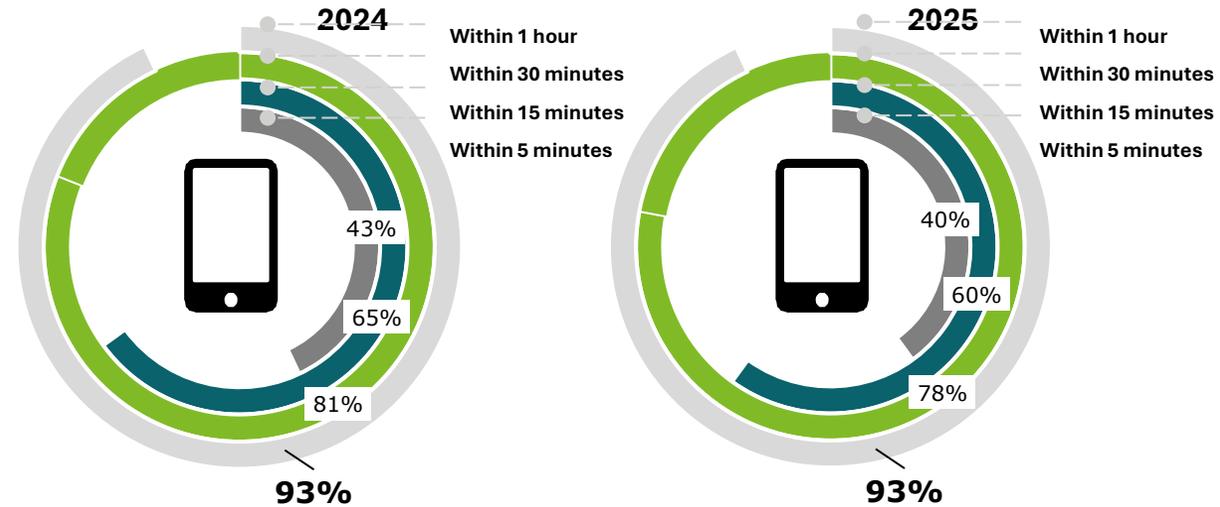
60% check their phone within 15 minutes of waking, showing a small decline from the previous year. Over a third of respondents check their phone at least 50 times daily, a pattern that has remained stable. This frequency is notably higher among Gen Z users (48%). This highlights the potential impact usage can have on people’s social interactions and sleep patterns.

Devices: Frequency of checking smartphone



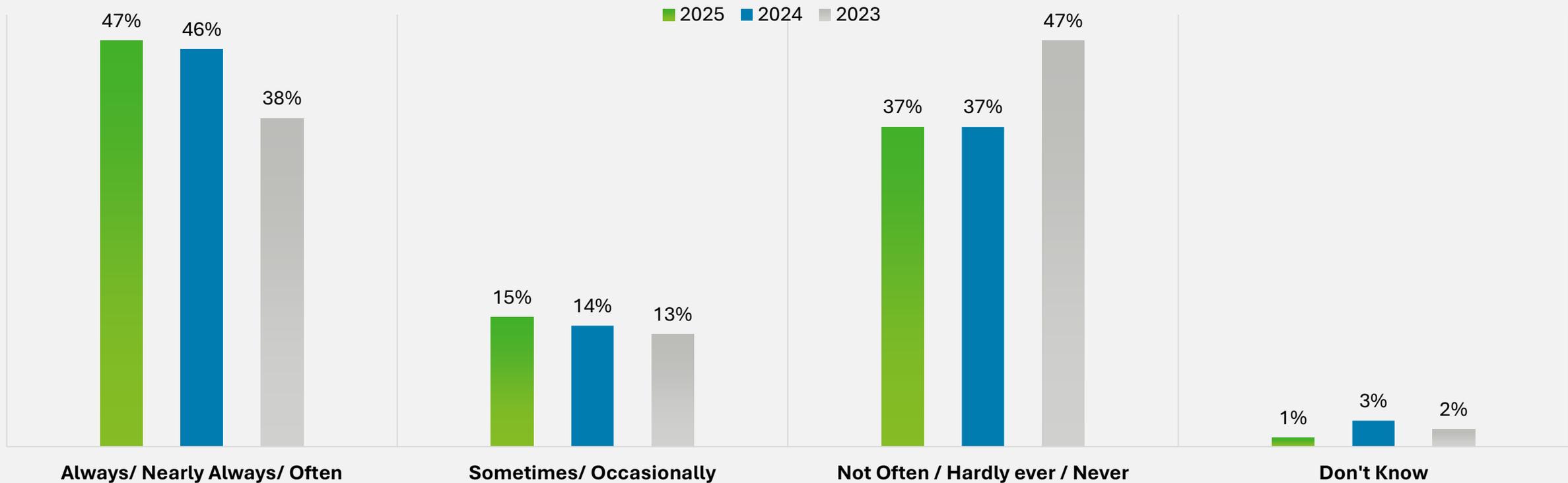
Question: Q42 - How many times would you estimate you look at your phone in a day?
 Weighted base: All adults 18-75 who have a phone or smartphone aged 18-75, 2025 (968)
 Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Devices: Morning usage



Question: Typically, how long is the interval between waking up and looking at your phone for the first time?
 Weighted base: All respondents aged 18-75, 2024 (1,000), 2025 (1,000)
 Source: Deloitte Digital Consumer Trends, Ireland, November 2025

In-Person Mobile Payments: Almost half (47%) adults regularly use their smartphone or smartwatch to make in-person payments.

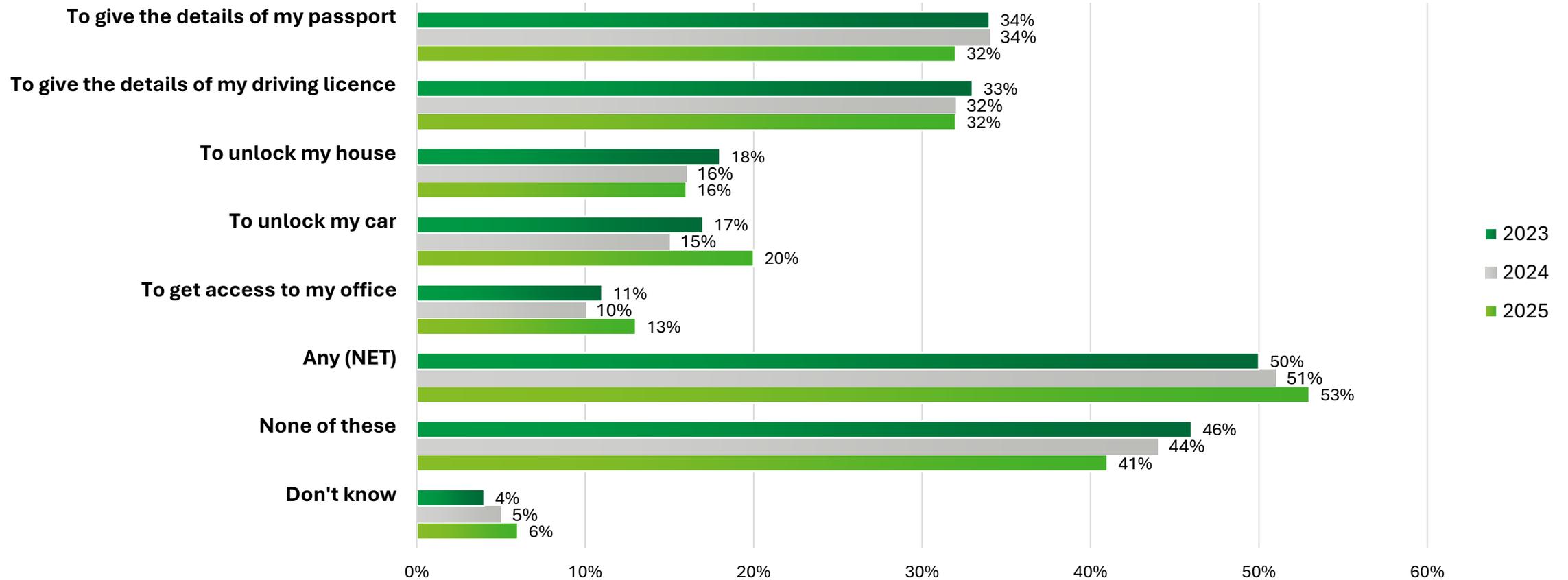


Question: When the option is available, how often do you use a smartphone or smartwatch to pay for things in person, for example, in a shop or restaurant?

Weighted base: All respondents aged 18-75, 2024 (1,000), 2025 (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Digital Identity: Adults in Ireland are not clamouring for digital identity solutions; 32% would like smartphone passport integration and 32% would like to be able to give the details of their driving license.



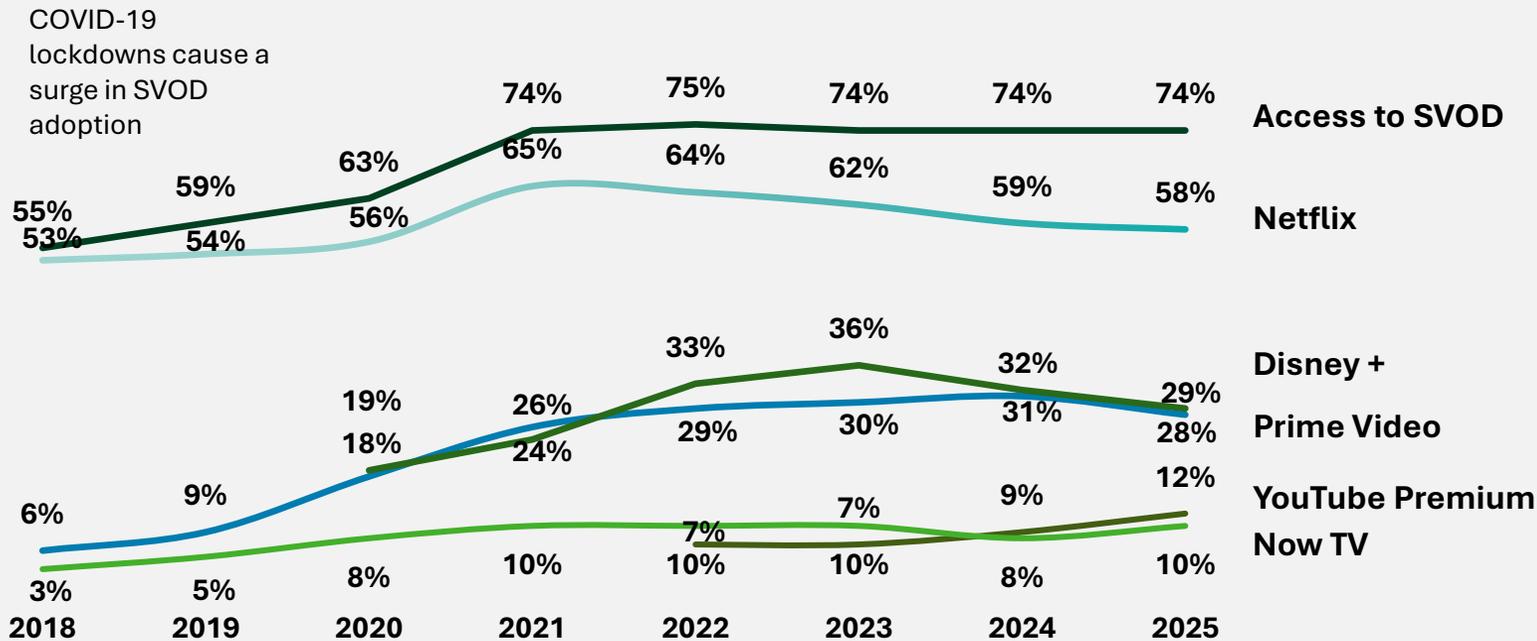
Question: Which, if any, of the following would you like to be able to use your smartphone for instead of using other items, such as physical keys, ID cards or documents?

Weighted base: All respondents aged 18-75, 2024 (1,000), 2025 (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

SVOD (Subscription Video on Demand) access remains stable compared to the last few years. Netflix remains the most popular SVOD in Ireland, followed by Disney+ and Amazon Prime video.

Access to at least one SVOD service vs Major OTT Players



Access to video streaming service subscriptions has remained stable over the past four years, effectively maintaining this level since the onset of the COVID-19 pandemic.

Netflix continues to lead the market by a significant margin, with nearly two in three people having access to the platform. However, this represents a continuing downward trend from its peak in 2021, when 65% of respondents reported having a Netflix subscription.

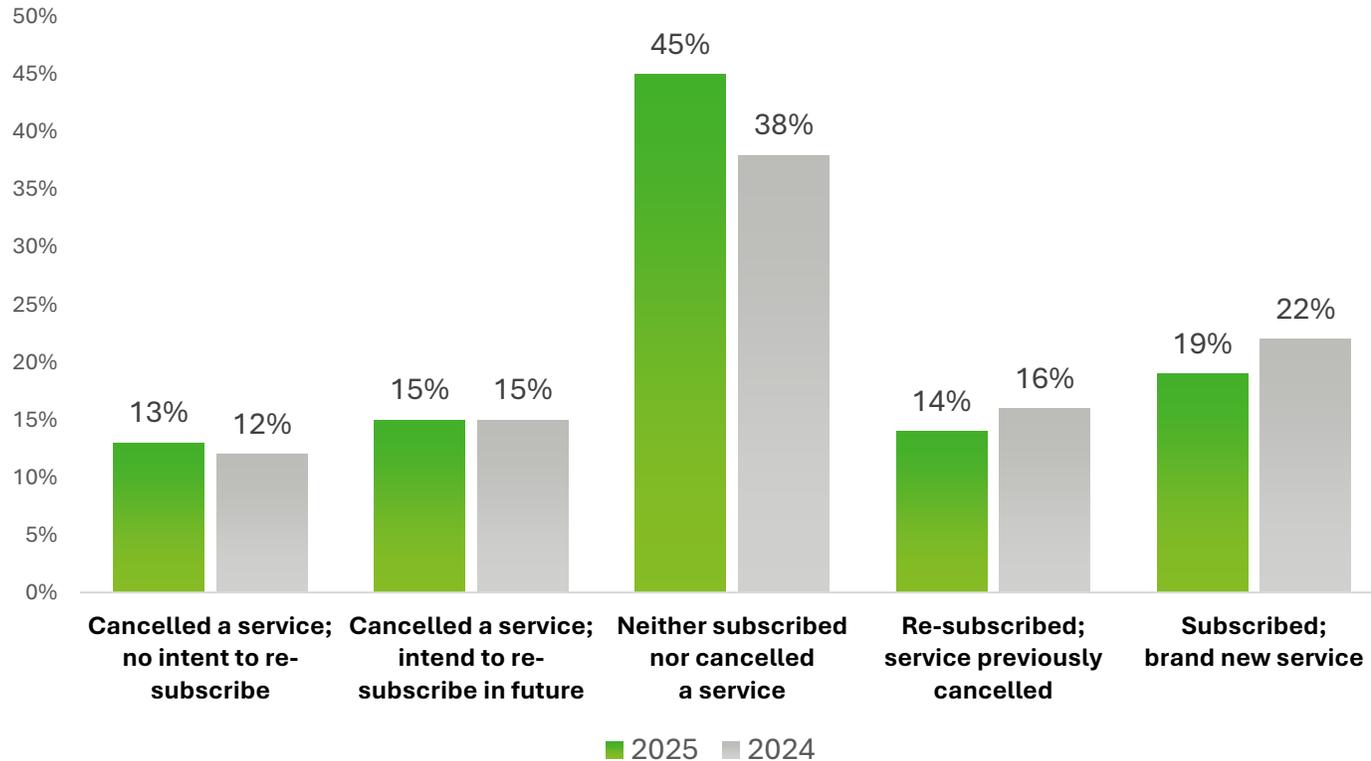
Question: Which, if any, of the following paid digital subscription services do you have access to? [VIDEO]

Weighted base: All respondents aged 18-75, 2018 (2,002), 2019 (1,000), 2020 (1,000), 2021 (1,000), 2022 (1,000) 2023 (1,000), 2024 (1,000), 2025 (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, 2018-2025

SVOD churn is steady at 25%. Whilst 45% neither subscribed nor cancelled, 33% subscribed to a new service or resubscribed to one they previously cancelled.

SVOD subscription and churning: Past 12 months



On average, respondents had access to 2.2 subscription services in 2025, representing a slight decline from 2.3 in 2024. The combined proportion of respondents as new subscribers or re-subscribing also decreased, falling to 33% in 2025 from 38% the previous year.

Conversely, cancellation rates over the past 12 months showed a positive shift, declining from 27% in 2024 to 25% in 2025, thereby reversing the upward trend observed in prior years.

25%

cancelled a video streaming service

33%

subscribed to a video streaming service

Question: In the last 12 months, have you or your household subscribed to any paid subscriptions for a video streaming service, or cancelled any existing ones?

Weighted base: All respondents aged 18-75, 2024 (1,000), 2025 (1,000); Not shown are respondents who answered Can't Remember (8%)

Source: Deloitte Digital Consumer Trends, Ireland, 2024-2025

SVOD platforms increasingly look to third-parties as a route to market.

In Ireland, one in five (21%) SVOD subscriptions are purchased through third-party providers such as telecommunications companies, or other aggregators. This approach allows SVOD platforms to offload billing responsibilities and some customer support functions to these intermediaries.

Bundling SVOD services could help reduce subscriber churn and minimise subscription cycling if their video platform is bundled for 18 or 24 months, by encouraging longer-term commitments.

However, with access to pay TV declining, this strategy may not entirely prevent cancellations but rather delay them, suggesting that while bundling offers some retention benefits, it is not a complete solution to subscription attrition.

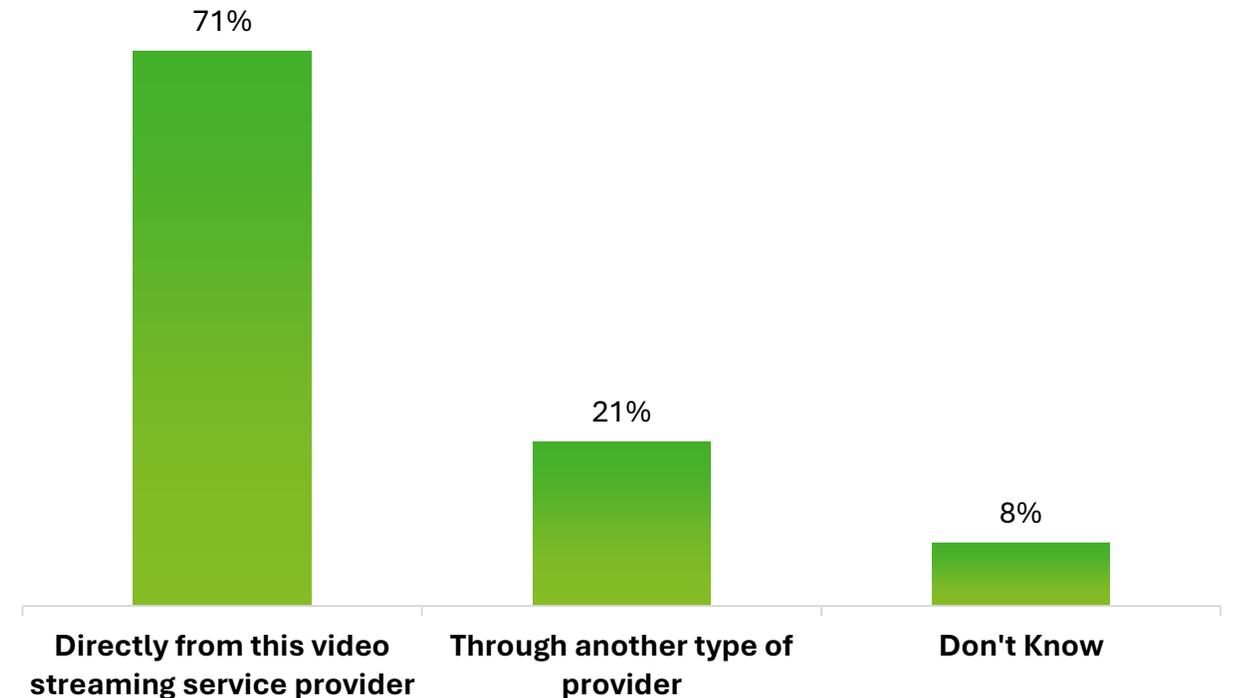
Question: Which, if any, of the following best describes how you/the account holder took out each of the following paid video streaming subscriptions?

Weighted base: All respondents aged 18-75 years, 2025, who have access to each paid video subscription service, Netflix (575), Amazon Prime Video (279), Disney+ (289), Apple TV+ (113), Discovery+ (68*)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

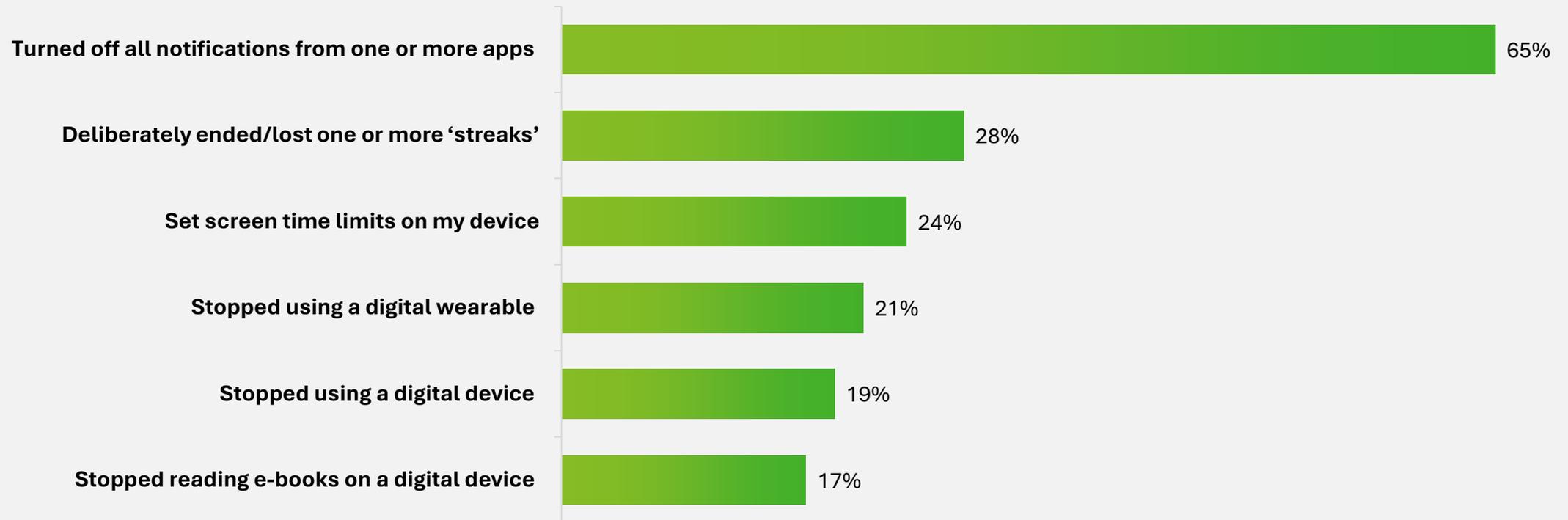
SVOD: Purchased direct vs via a third-party

Asked across five of the most popular SVOD platforms. The below represents proportions of the number of total subscriptions taken out by Ireland citizens



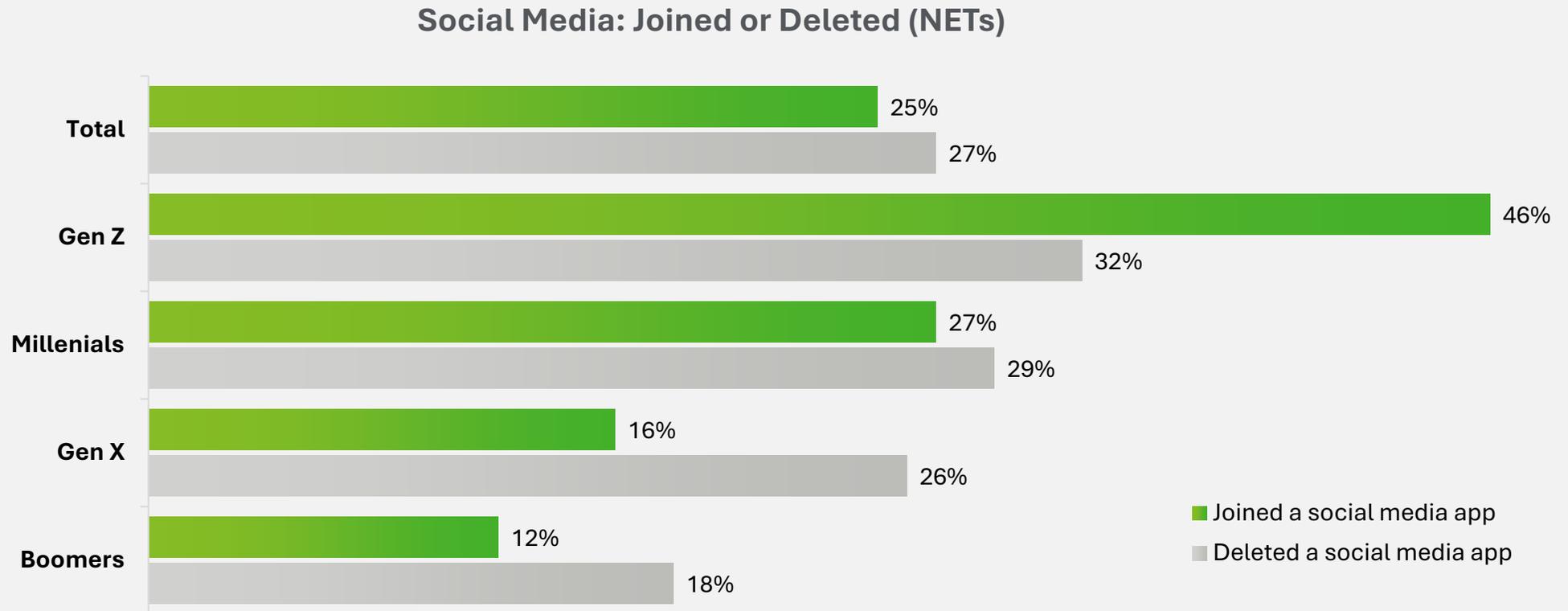
About two-thirds (65%) have turned off all notifications from apps and over one in four (28%) have deliberately ended a digital ‘streak’ in the past year.

De-Digitisation: Which of these have you done?



Question: Which, if any, of the following have you personally done in the last 12 months?
Weighted base: All respondents aged 18-75, 2025 (1,000)
Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Gen Z move fast through social media platforms: 46% of them have joined a social media app in the last year, though 32% have deleted one.



Question: In the last 12 months, have you joined any social media apps or deleted any existing ones from one or more of your devices?

Weighted base: All respondents aged 18-75, 2025 (1,000), Gen Z (193), Millennials (340), Gen X (267), Baby Boomer (200)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

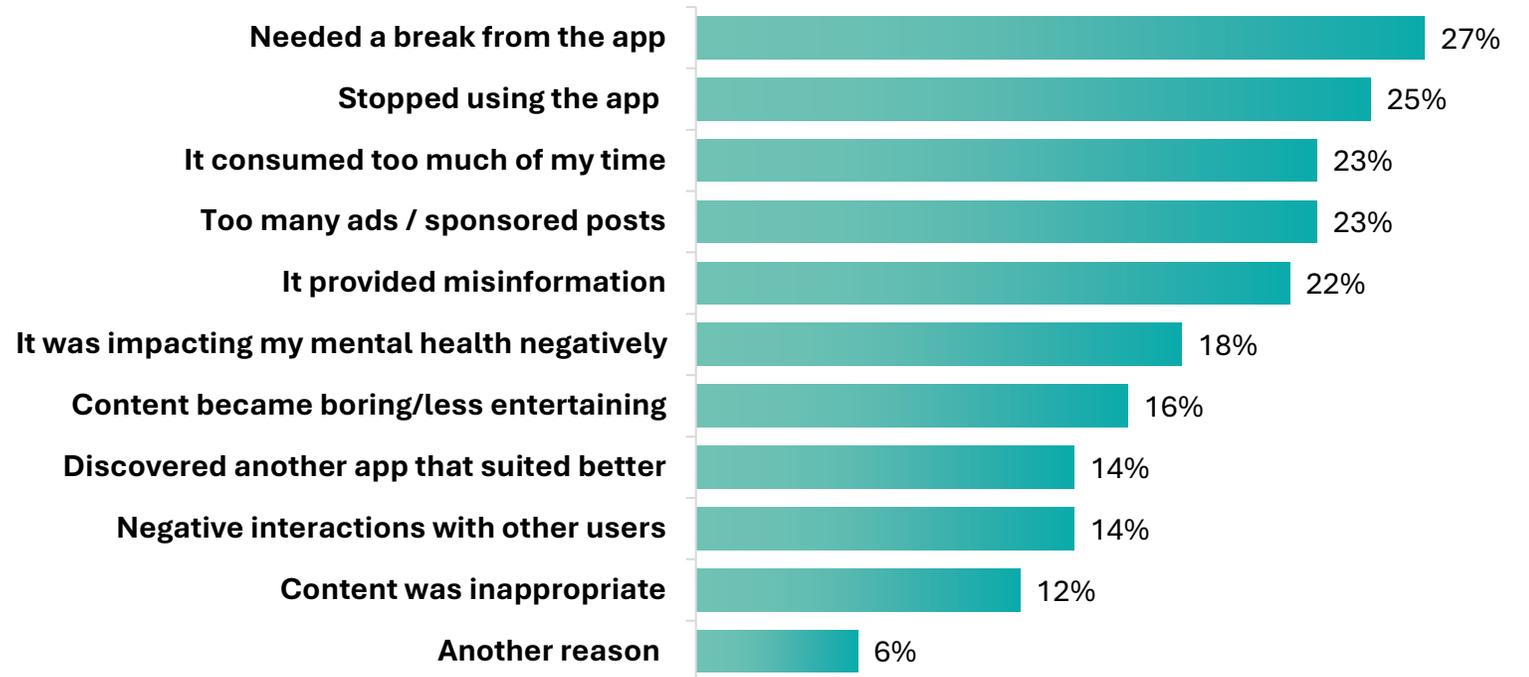
Over a quarter (27%) of those who deleted a social media app did so because they needed a break.

27%

deleted a Social Media app in the past 12 months



Social Media: Reasons for Deleting



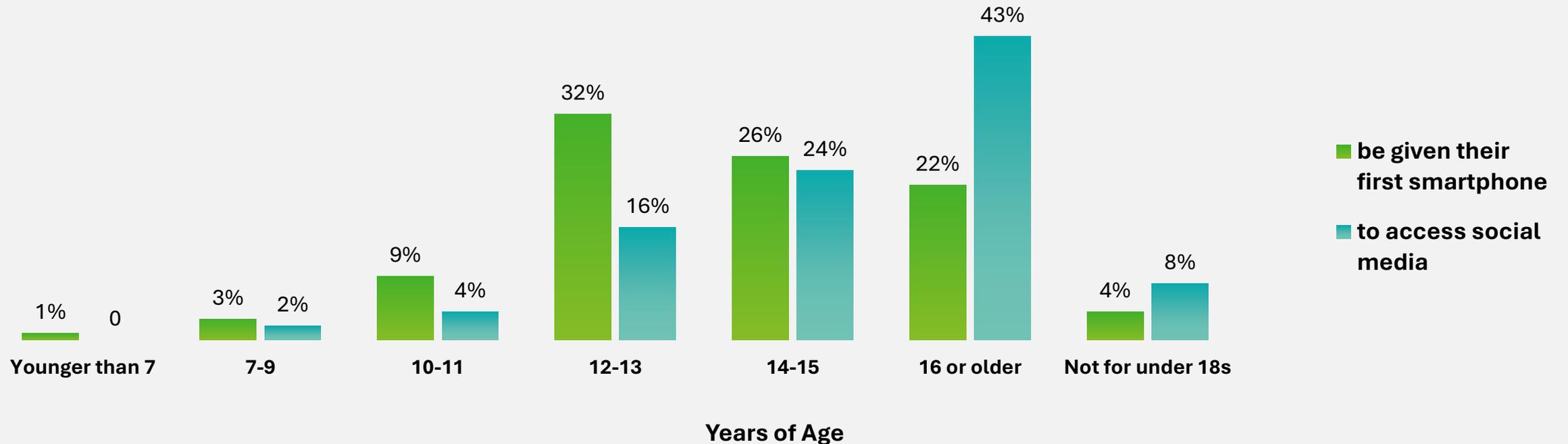
Question: In the last 12 months, have you joined any social media apps or deleted any existing ones from one or more of your devices?; You mentioned that you have deleted a social media app in the last 12 months. What prompted you to make this decision?

Weighted base: All respondents aged 18-75, 2025 (1,000), who have deleted social media temporarily or permanently in the past 12 months, 2025 (339); excludes "Don't know" (1%)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

About six in ten (59%*) in Ireland feel the appropriate age for a first smartphone is between 12-15 years old. Overall, people feel access to a smartphone itself may be safer than access to social media for those aged 15 or under.

Views on acceptable age for children to...



Question: At what age do you think it's acceptable for a child...? - to be given their first smartphone for their own personal use? - to access social media for their own personal use?

Weighted base: All respondents aged 18-75 who have a phone or smartphone, 2025 (968); Don't Know excluded (2%)

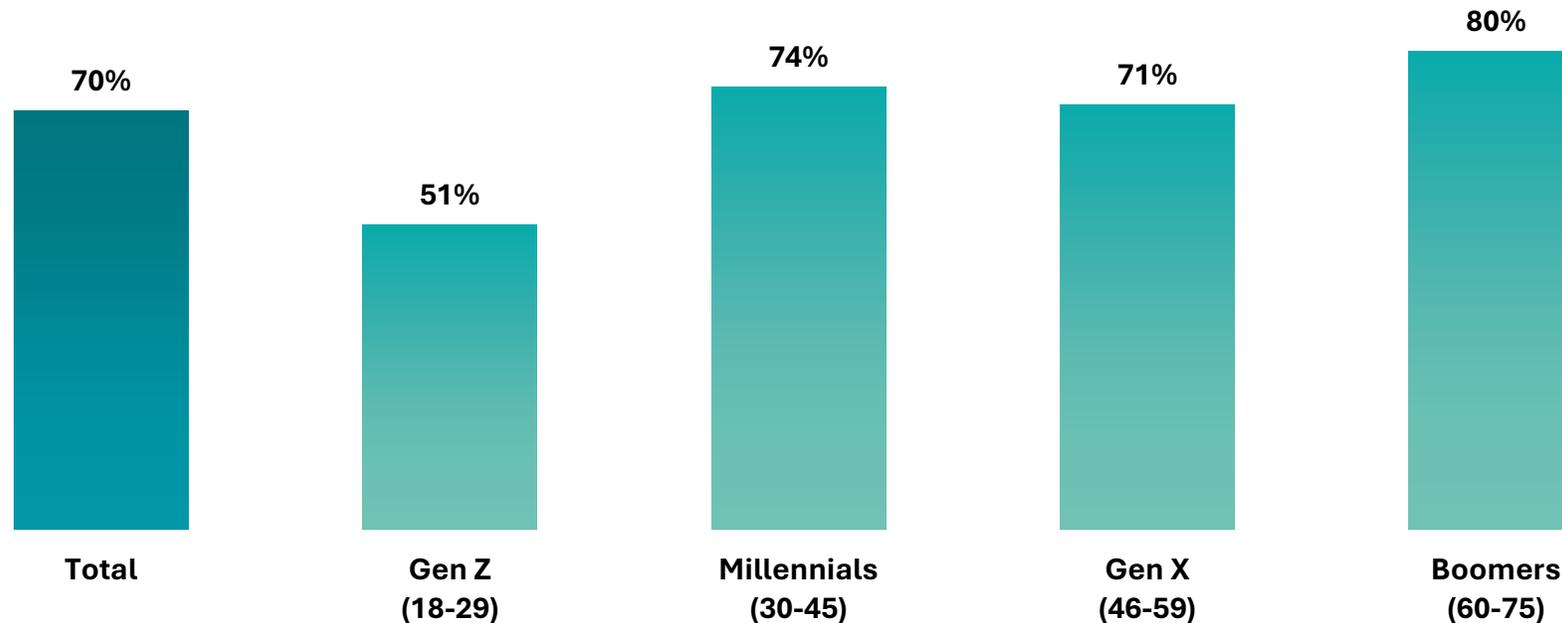
Source: Deloitte Digital Consumer Trends, Ireland, November 2025

*32.3% (ages 12-13) and 26.24% (ages 14-15), totaling 58.58%

Just over half (51%) of Gen Z would favour a ban on social media for people under 16 years

With Australia being the first country to ban social media access to those under 16 years of age, reflecting this trend, 7 in 10 of Irish respondents also support a similar ban. Among Gen Z, who have grown up immersed in social media, just over half are in favour of restricting access before 16, while nearly a quarter remain neutral on the issue. These preferences suggest that implementing certain safeguards could satisfy the majority.

Favour a social media ban for under 16s



Question: To what extent would you favour or oppose the implementation of each of the following? Banning social media usage for people younger than 16 years old?

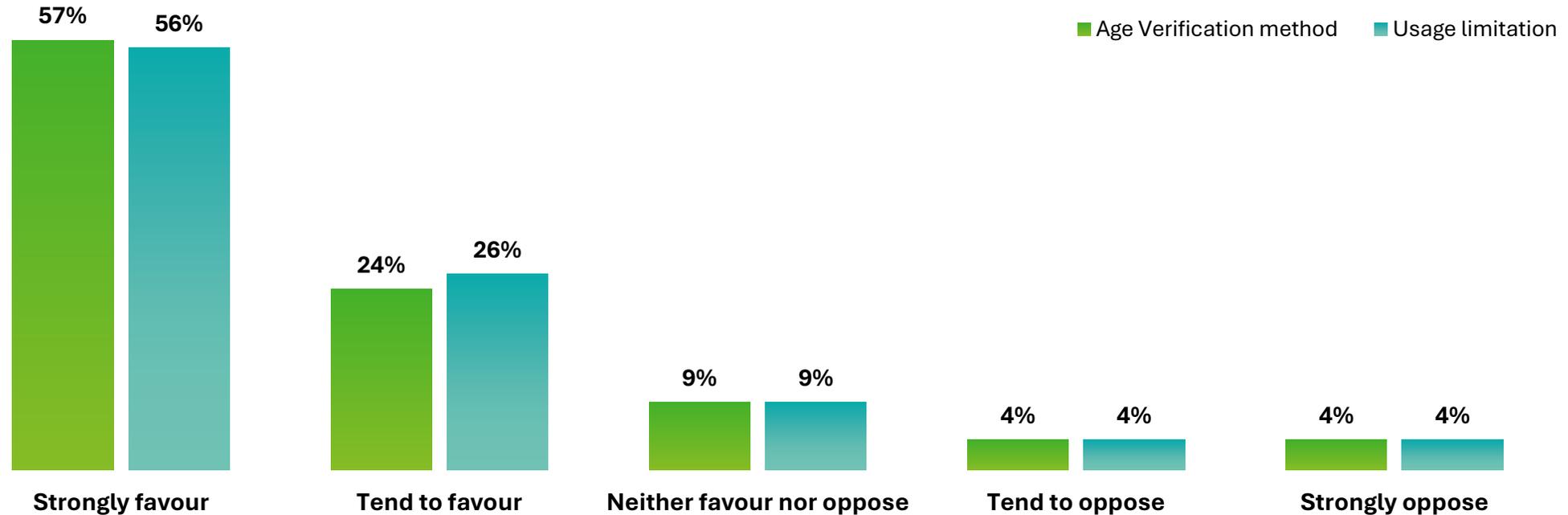
Weighted base: All respondents aged 18-75 who have a phone or smartphone, 2025 (968), Gen Z (183), Millennials (330), Gen X (261), Baby Boomer (193)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

82% support social media platforms introducing usage limitations for those under 18.

Public sentiment strongly aligns with protective social media measures, with over 80% of users endorsing both age verification at sign-up and stricter usage limits for those under 18.

Favour age limitations and verifications for under 18s



Question: To what extent would you favour or oppose the implementation of each of the following? Limitations and verifications for social media usage for people younger than 16 years old?

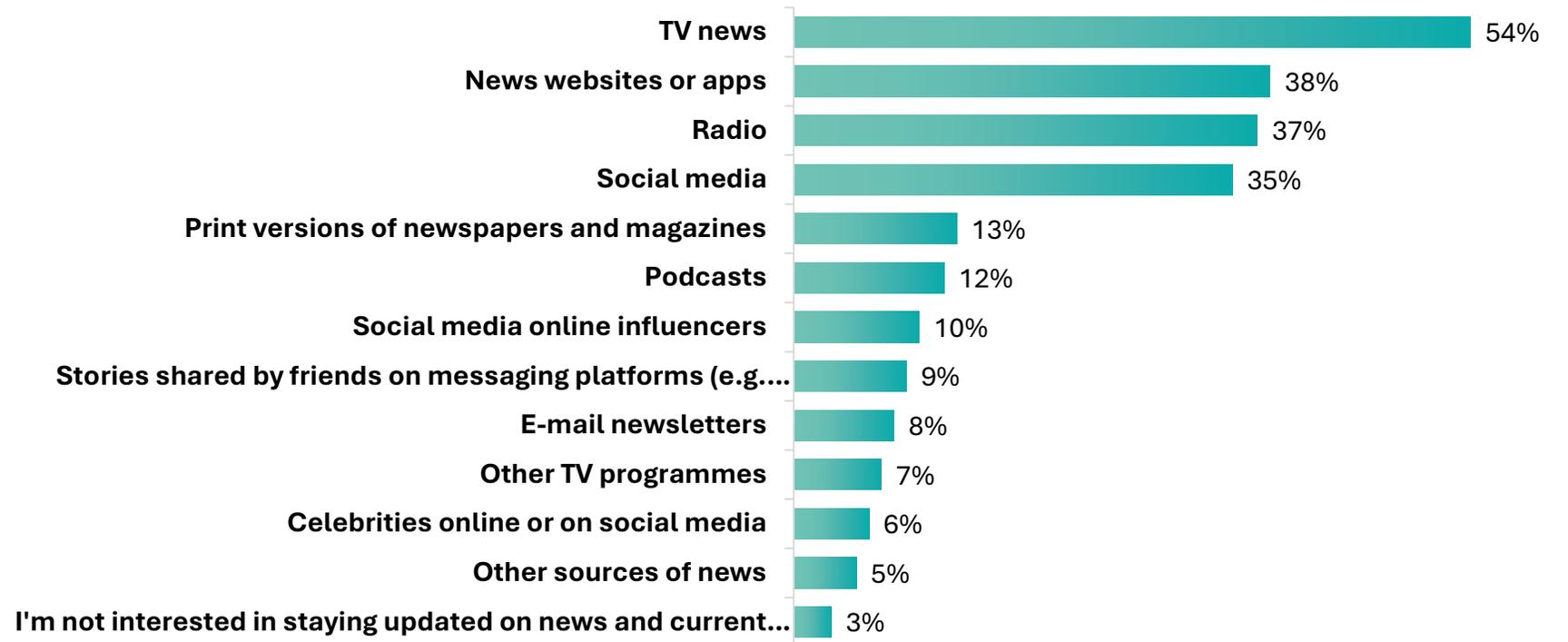
Weighted base: All respondents aged 18-75 who have a phone or smartphone, 2025 (968), Gen Z (183), Millennials (330), Gen X (261), Baby Boomer (193)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Overall, TV remains the primary preferred source of news content, but there are significant variations by generation cohorts.

22%
deleted an app because
it provided
misinformation.

Preferred news source (top three)



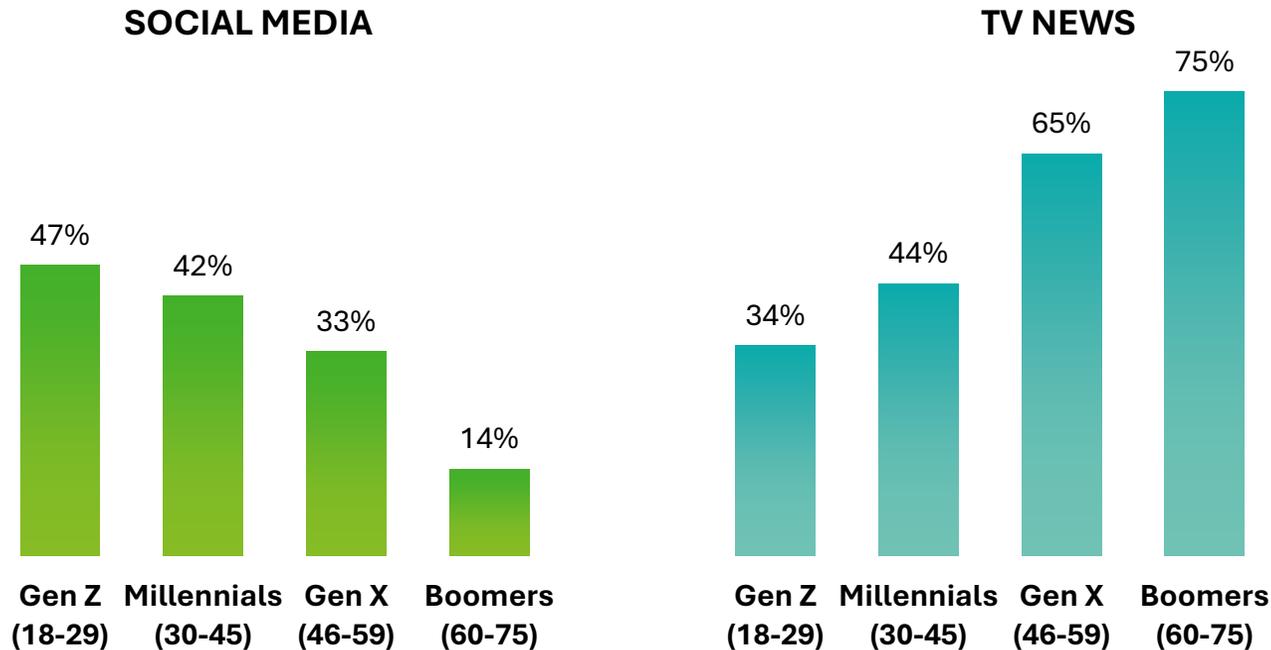
Question: Which, if any, of the following are your most preferred methods to stay updated on news or current events?

Weighted base: All respondents aged 18-75, 2025 (1,000)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Younger generations use social media as their most preferred source for news; older generations prefer TV news.

Preferred news source



While TV remains the overall preferred news source, significant generational differences are evident.

For younger generations, such as Gen Z and Millennials, nearly half use social media for news. This often provides algorithmically tailored content and diverse viewpoints, necessitating careful verification of accuracy.

In contrast, Baby Boomers largely prefer traditional media like television (75%) and radio (54%).

News websites and apps are a popular middle ground (38% of people cite them as a preferred source), which bridge the gap between preferences of old and young.

Question: Which, if any, of the following are your most preferred methods to stay updated on news or current events?

Weighted base: All respondents aged 18-75, 2025 (1,000), Gen Z (193), Millennials (340), Gen X (267), Baby Boomer (200)

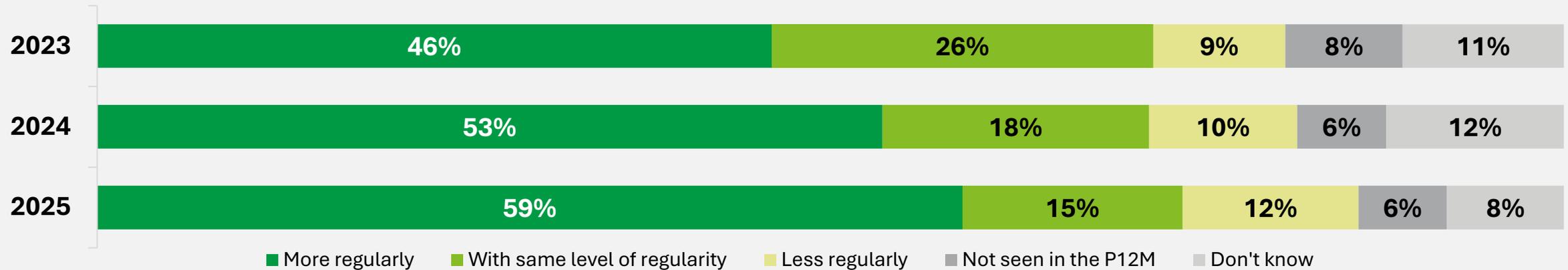
Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Online misinformation persists. About six in ten (59%) in Ireland have more regularly seen information on social media that was subsequently proven to be fake.

Over the past three years, the proportion of respondents encountering online misinformation more regularly has risen from 46% in 2023 to 59% in 2025.

While younger groups, particularly Gen Z, were previously more likely to have seen and identified misinformation, this trend has shifted in the current year. Approximately 21% of Gen Z respondents now report seeing misinformation less regularly, which is nearly double the rate observed across all respondents. This suggests a changing dynamic in how different age groups perceive and encounter misinformation online.

Online misinformation: Seeing and identifying

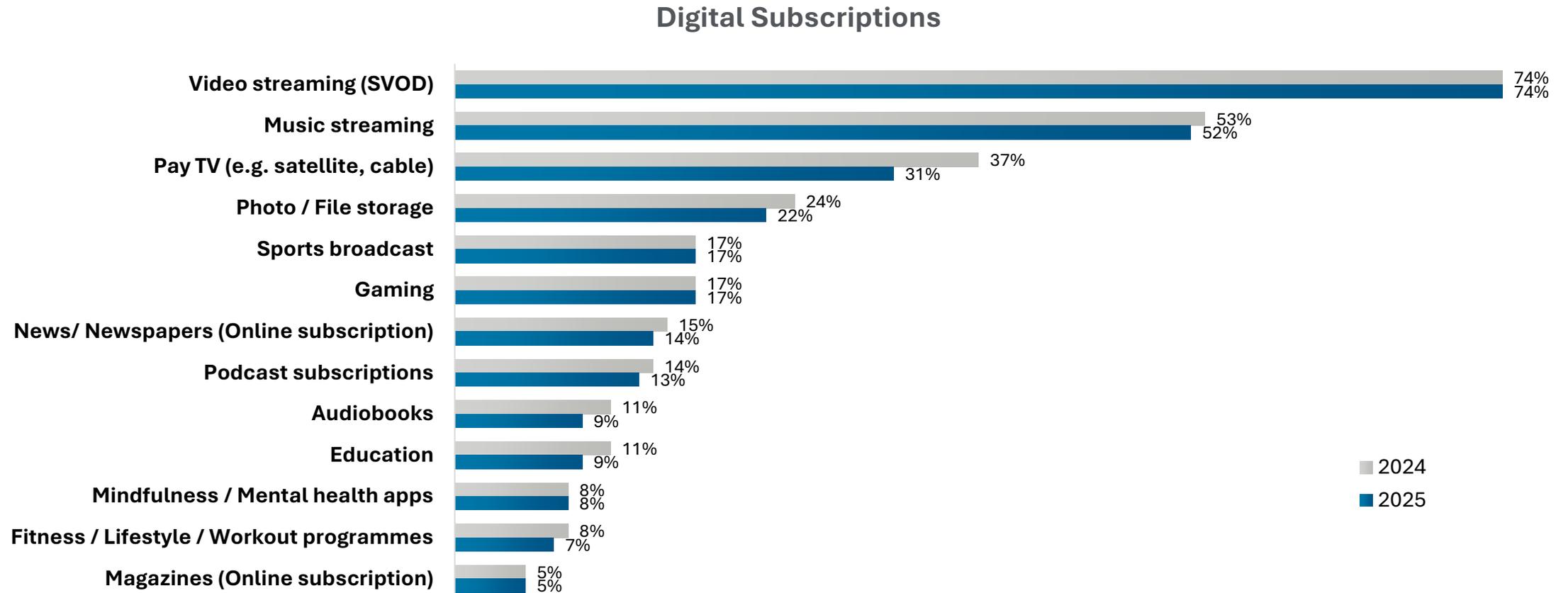


Question: The next question is about information that is presented to be true on social media but is subsequently proven to be fake. For example, a doctored video, altered photo, untrue articles, misinformation, or content with misleading captions. These days, would you say you are seeing this type of information more or less regularly than you were 12 months ago or are you seeing it with the same level of regularity?

Weighted base: All respondents aged 18-75, (half sample - sample B) 2025 (494), 2024 (501), 2023 (503)

Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Overall, access to paid digital subscriptions is stable year-on-year. Video streaming, music and pay TV are the most popular subscriptions.



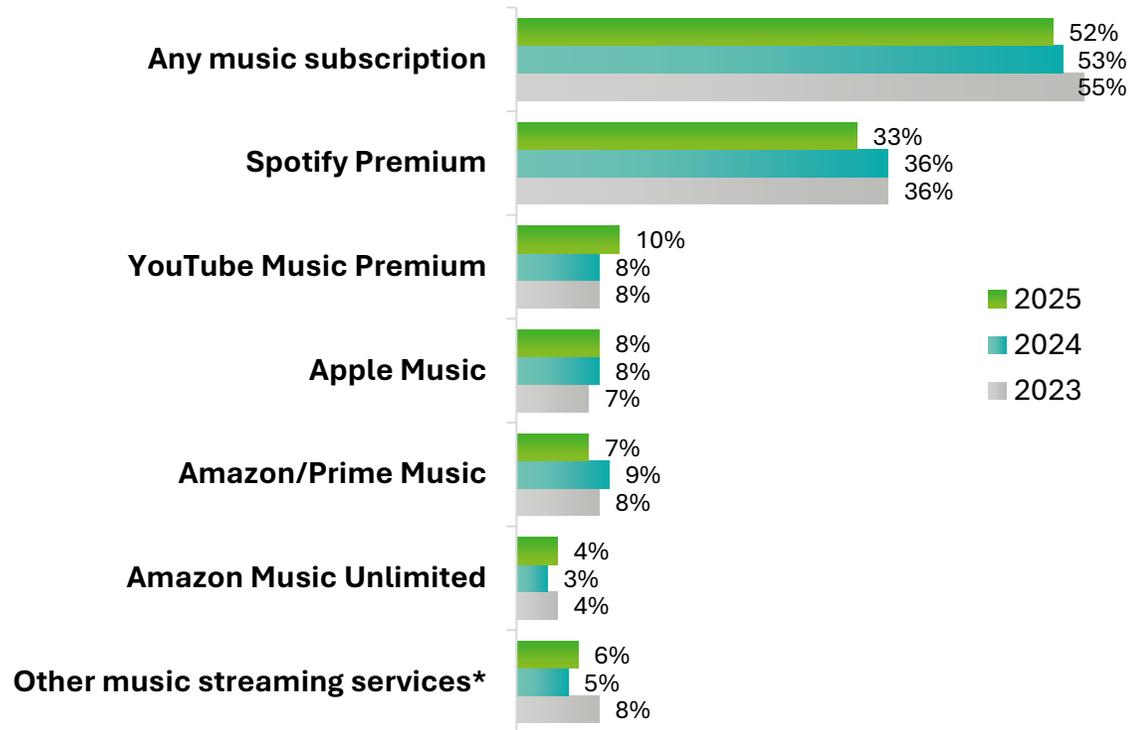
Question: Which, if any, of the following paid digital subscription services do you have access to? [SVOD and Music]; Thinking about paid services or subscriptions, which, if any, of the following do you have access to?

Weighted base: All respondents aged 18-75, 2024 (1,000), 2025 (1,000); Excludes "None of these", "Don't know"

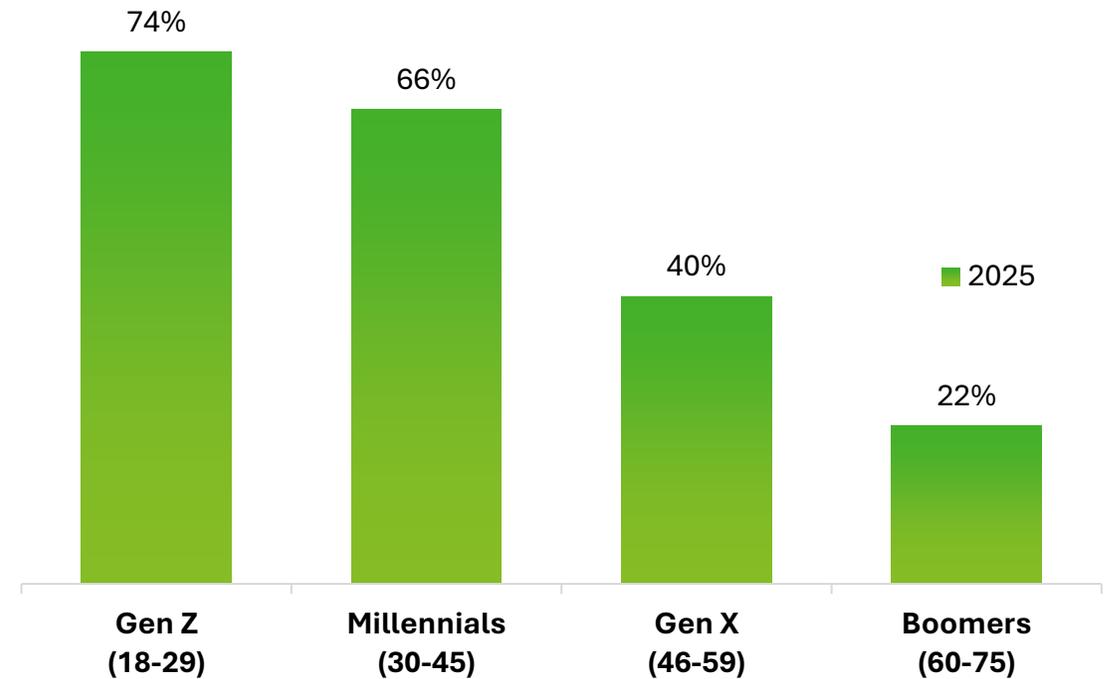
Source: Deloitte Digital Consumer Trends, Ireland, November 2025

Access to paid music subscriptions is steady. Among Gen Z, 74% have access to music subscriptions.

Access to a paid music subscription



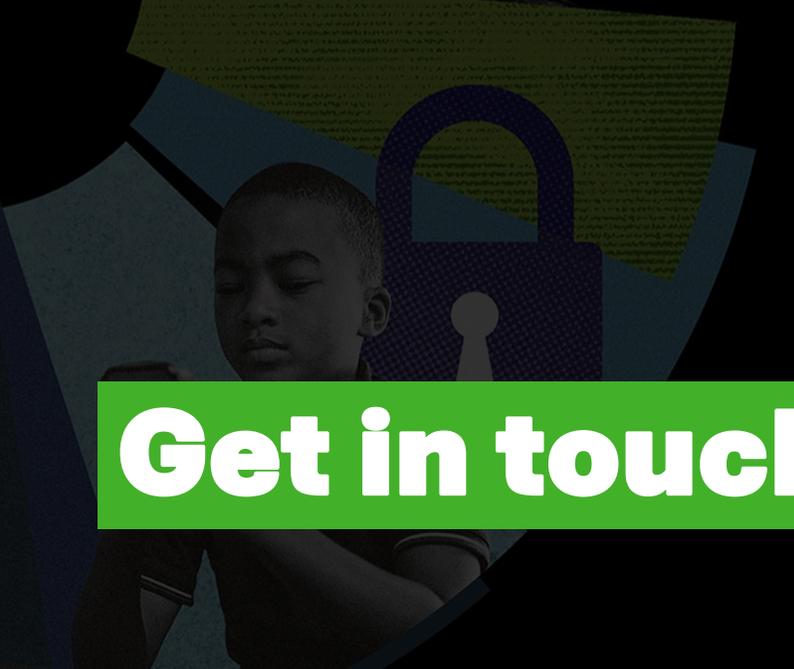
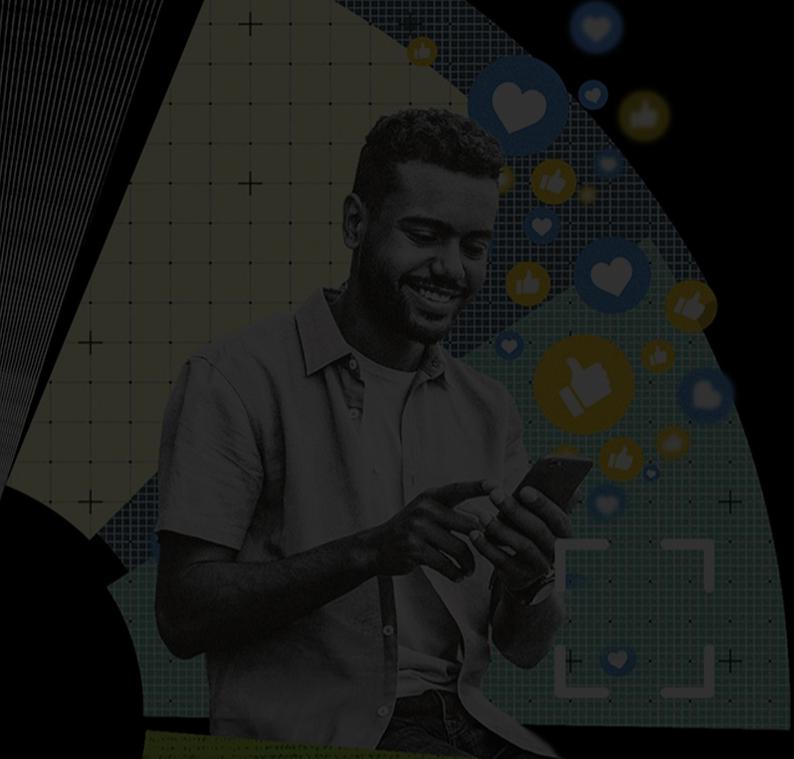
Any music subscription - among generations



Question: Which, if any, of the following paid digital subscription services do you have access to?* [Music]

Weighted base: All respondents aged 18-75, 2023 (1,000), 2024 (1,000), 2025 (1,000). Generations in 2025: Gen Z (193), Millennials (340), Gen X (267), Baby Boomer (200). 'Other music streaming services' includes Soundcloud Go/Go+ and Deezer Premium

Source: Deloitte Digital Consumer Trends, Ireland, November 2025



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