An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

COMREG MOBILE CONSUMER EXPERIENCE 2025

Quantitative Report

March 2026

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INTRODUCTION

Introduction

A nationally representative sample of n=2,977 adults, 18+ years

Fieldwork for this study was conducted between **31st July and 9th November 2025**.

This research has been carried out previously in 2017, 2019, and 2022; while the methodology has remained the same (Face-to-face interviewing via CAPI in respondents' homes), there has been a change in sampling.

In previous waves, the total sample was split across five distinct segments, based on **population density**, with a higher proportion of interviews conducted in areas of lower population density (the sample size by segment detail will follow). Given improvements in mobile coverage across Ireland, it was deemed that there was no longer a need for a sampling structure that leaned more heavily on lower population density areas. Instead, a nationally representative sample of those aged 18+ was utilized, with 3,000 remaining as the target for completes.

In previous years, a corrective weight was applied to the data to ensure it was fully representative of all adults in Ireland. As such, comparisons between 2025 and previous waves can still be made.

A total sample of 2,977 was achieved. To ensure complete representativity weights that are nationally representative have been employed. Additional weights to ensure we have an accurate reflection of mobile providers and payment methods (billpay vs prepay) have been utilised .

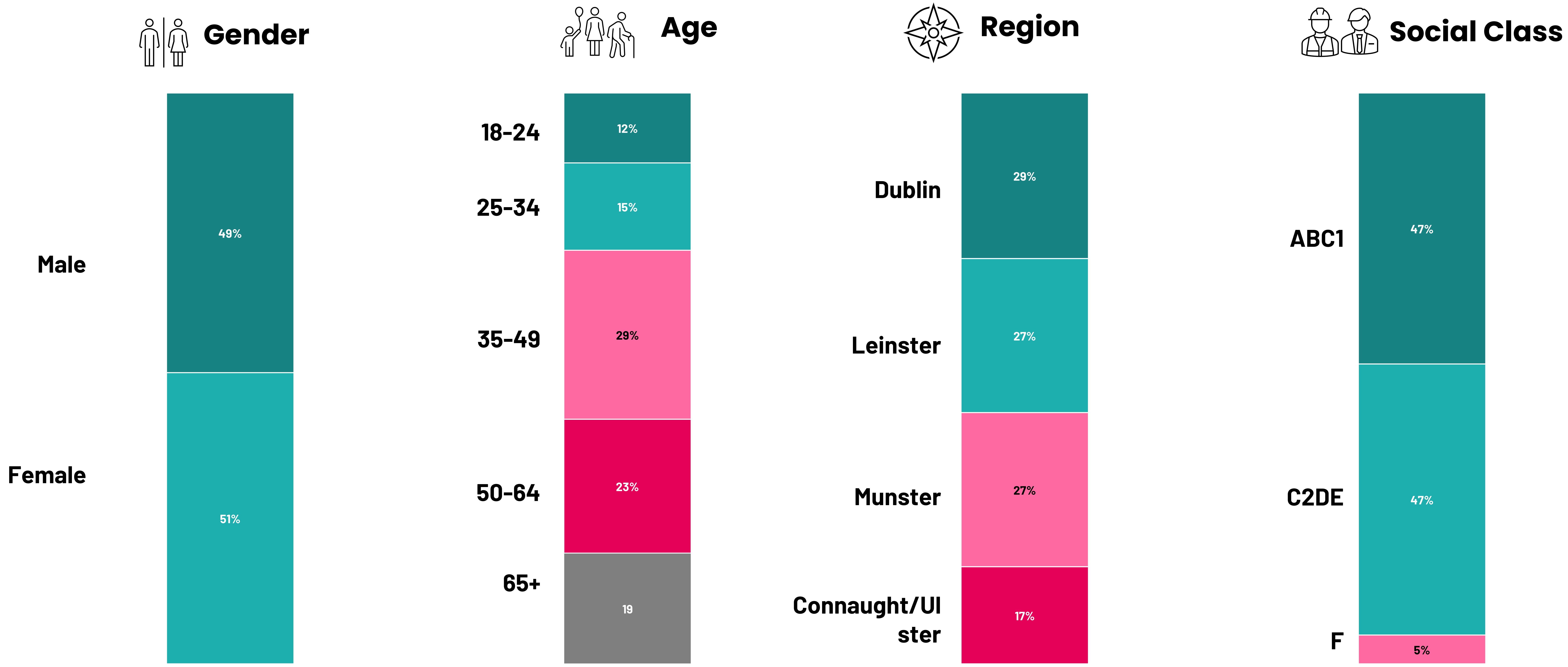
Margin of error on a sample of 3,000 is +/-2%pts. For smaller sub-samples the margin will be greater.

Significance testing at 95% confidence level was applied to the data and differences are highlighted throughout this presentation. In tables, green highlighting = significantly higher result than total result, while red highlighting = significantly lower result than total result.

Commentary detailing 'higher' or 'lower' identifies findings that are significantly higher or lower versus the total sample.

Profile of Respondents

Analysis of Sample



Base: All respondents: 2977

Positive and Negative trends this wave

Positives:

- Universal mobile ownership continues (98%).
- Strong 5G adoption (up from 17% in 2022 to 60%) and understanding of the improved connectivity compared to 4G.
- Improved satisfaction with coverage has been recorded, both within the household (mean score of 8.14 out of 10) and in other areas (mean score of 8.06).
- The second-hand phone market is continuing to grow, with purchases doubling since 2022. This is a big positive for sustainability efforts.
- The switching process appears to be a simple one, with the vast majority of those switching noting the process was extremely easy (64% giving 9-10 score).

Negatives:

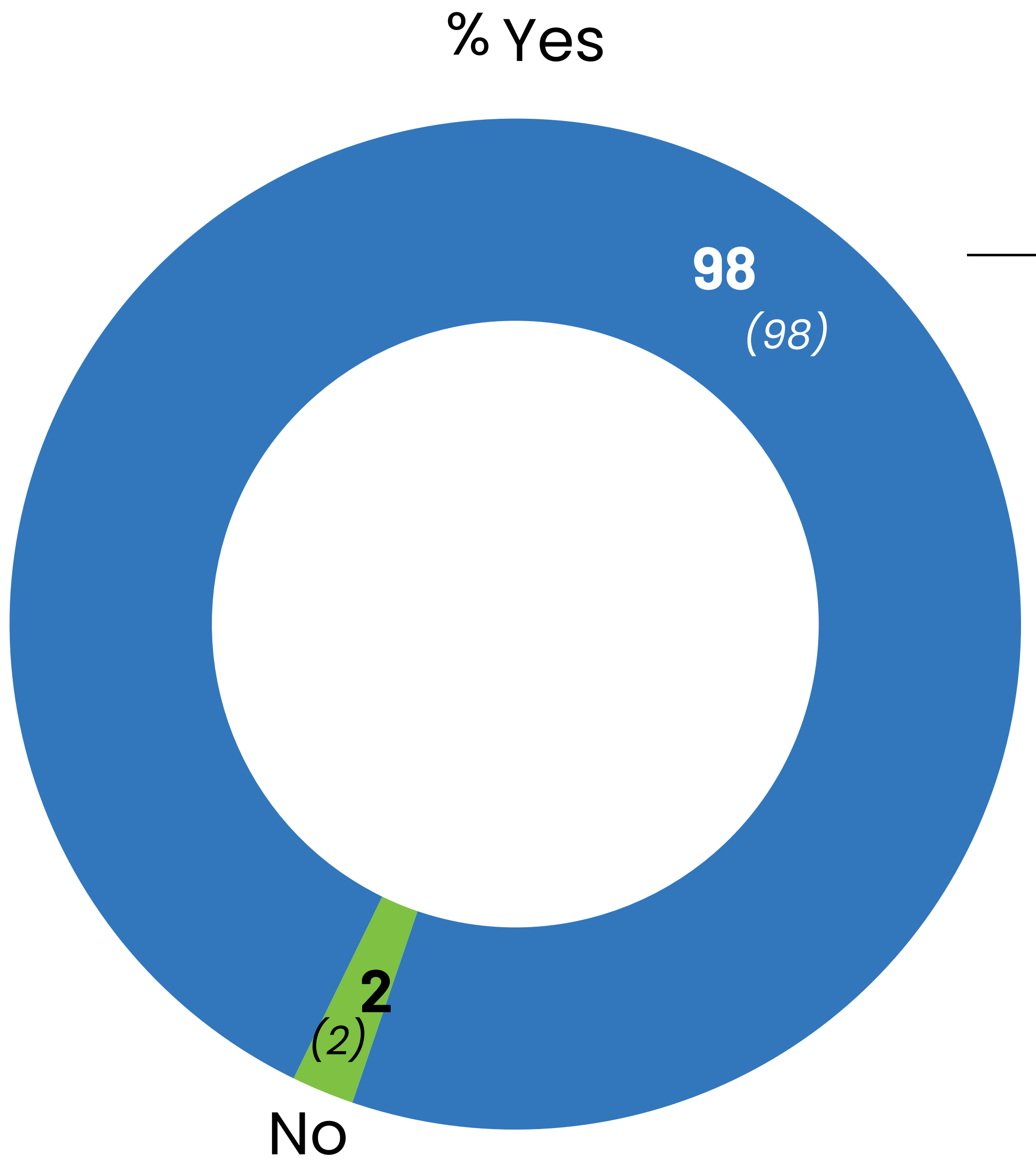
- Market remains extremely sticky, with 70% noting they have been with their provider for more than 3 years.
- Significant minority are still experiencing coverage issues (33%), which is higher among rural cohorts.
- 2 in 3 of those experiencing in-contract price increases are not doing anything about it, which may be due to customers' inability to exit a contract without paying an early termination fee.
- The digital divide persists, with the 65+ age group lagging in smartphone and data usage, albeit progress is being made.

USE AND OWNERSHIP

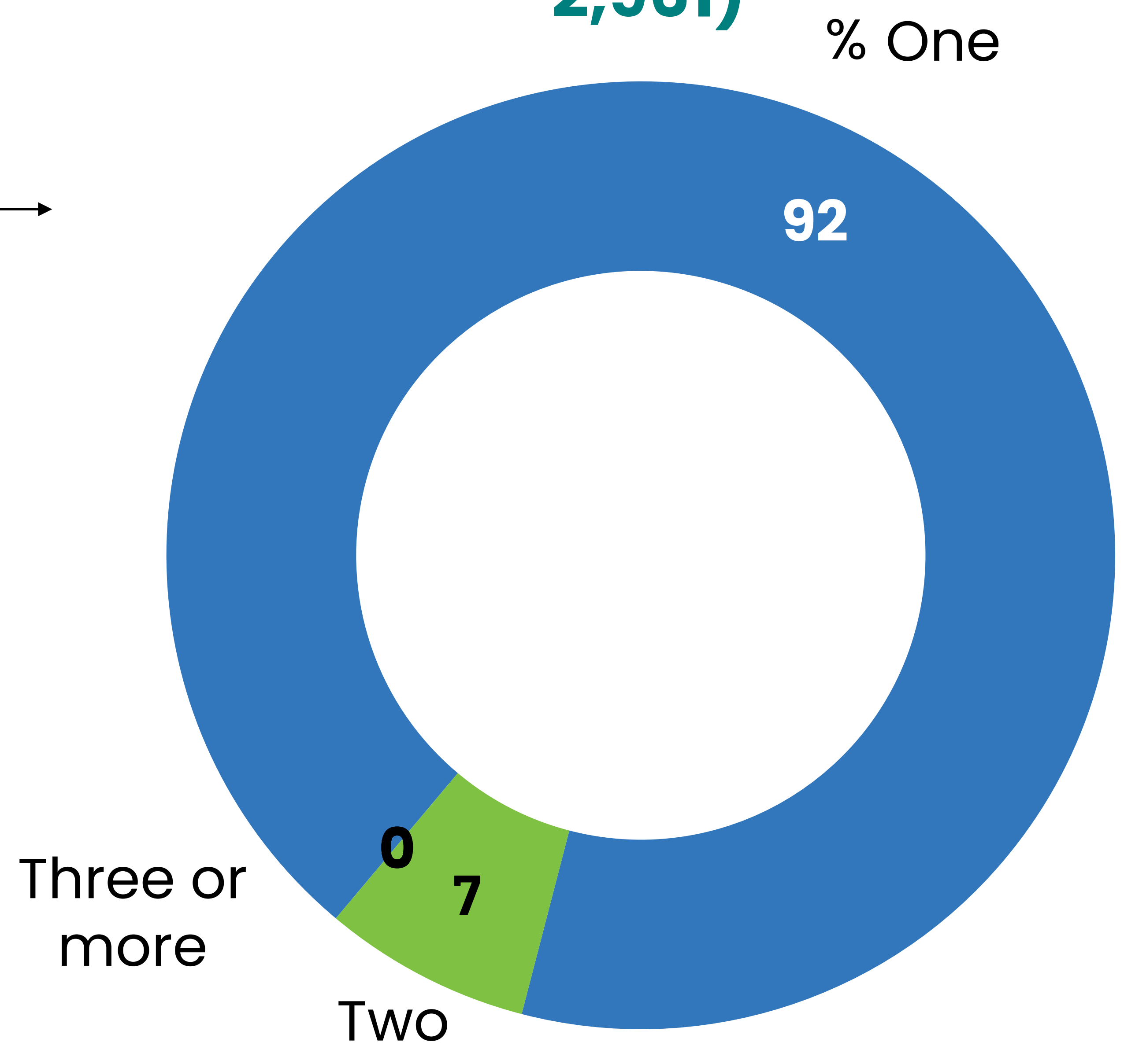
Mobile Phone ownership

Almost universal ownership of mobile phones (though +65s are slightly less likely to own a phone), with 7% having multiple phones. 1 in 10 have phones paid for by their employer, which peaks among those with multiple phones (70%).

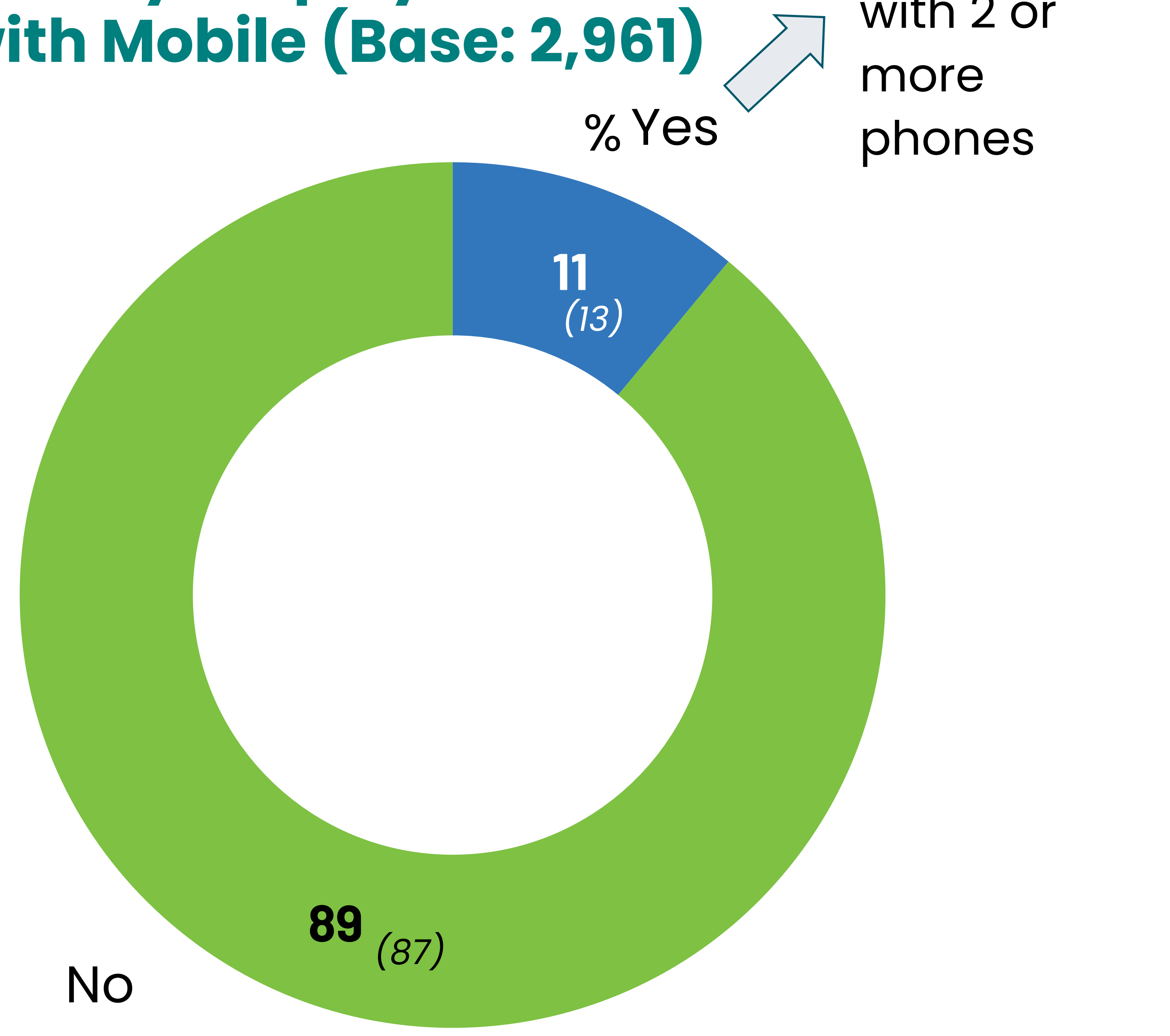
Personally own or use a mobile phone handset



IF YES: Number of handsets being used
All with Mobile (Base: 2,961)



If yes: Use of mobile paid for by my employer
All with Mobile (Base: 2,961)



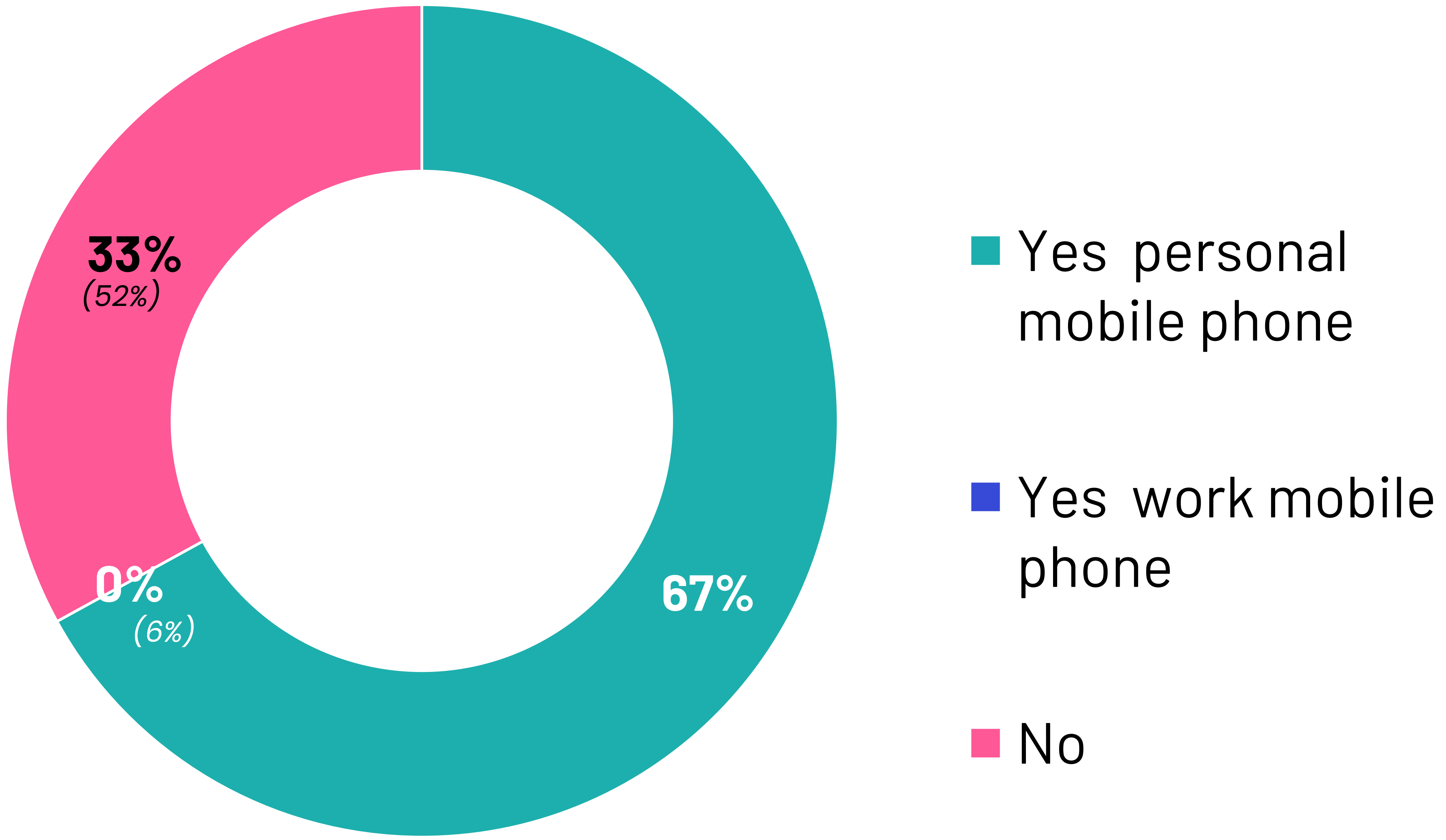
Q.1. Do you personally own or use a mobile phone handset (including any mobile phone owned by your employer)?
Q1a How many mobile phone handsets do you use?
Q.1b Do you use a mobile phone handset that is paid for by your employer?
Base: All Adults – 2977

( ) = 2022

Among those who don't have a mobile phone…

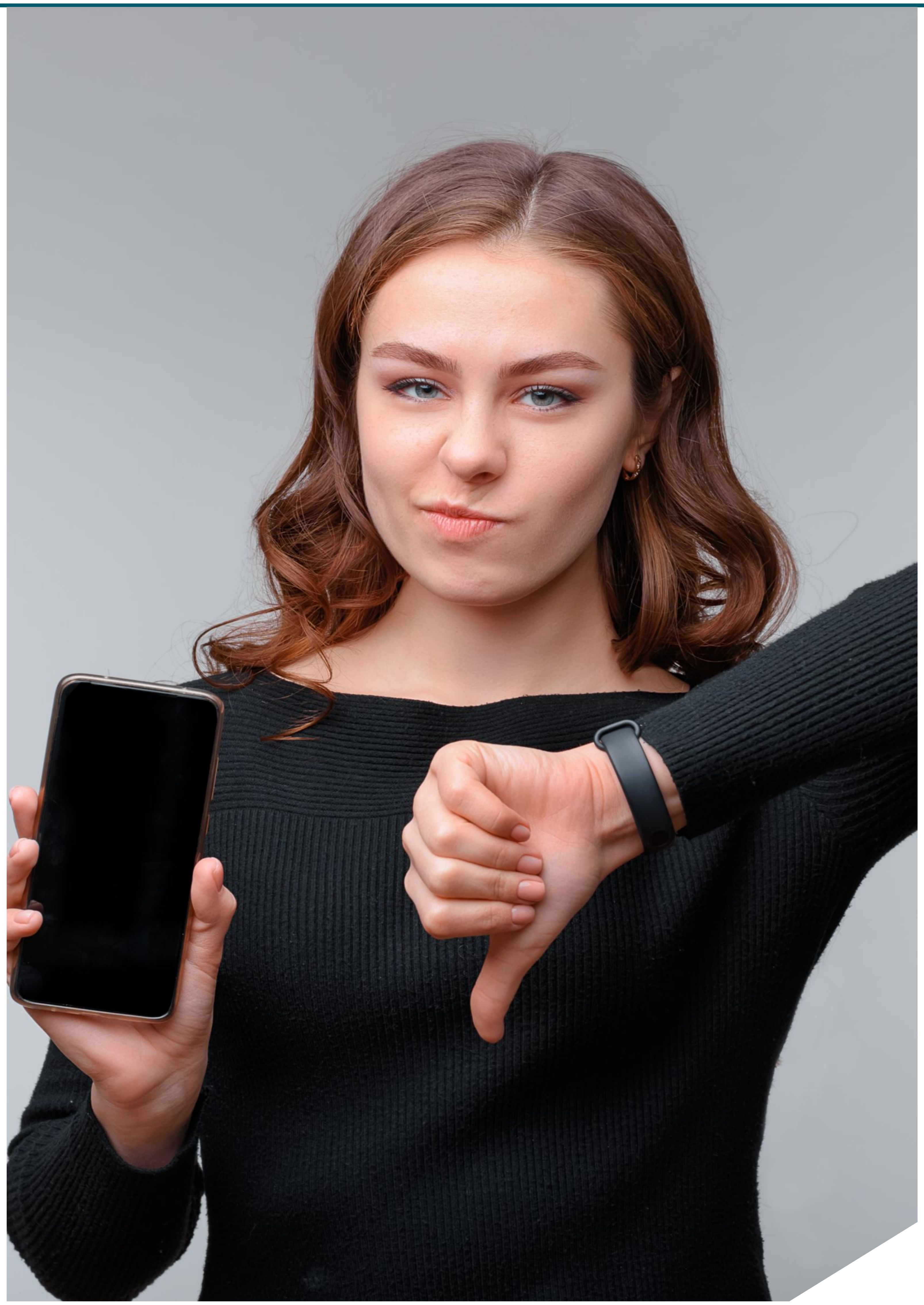
One third have never owned a mobile phone.

Previous ownership of mobile phone



Q.2 Did you ever own a mobile phone?
Base: All Adults with no mobile phone – n=16

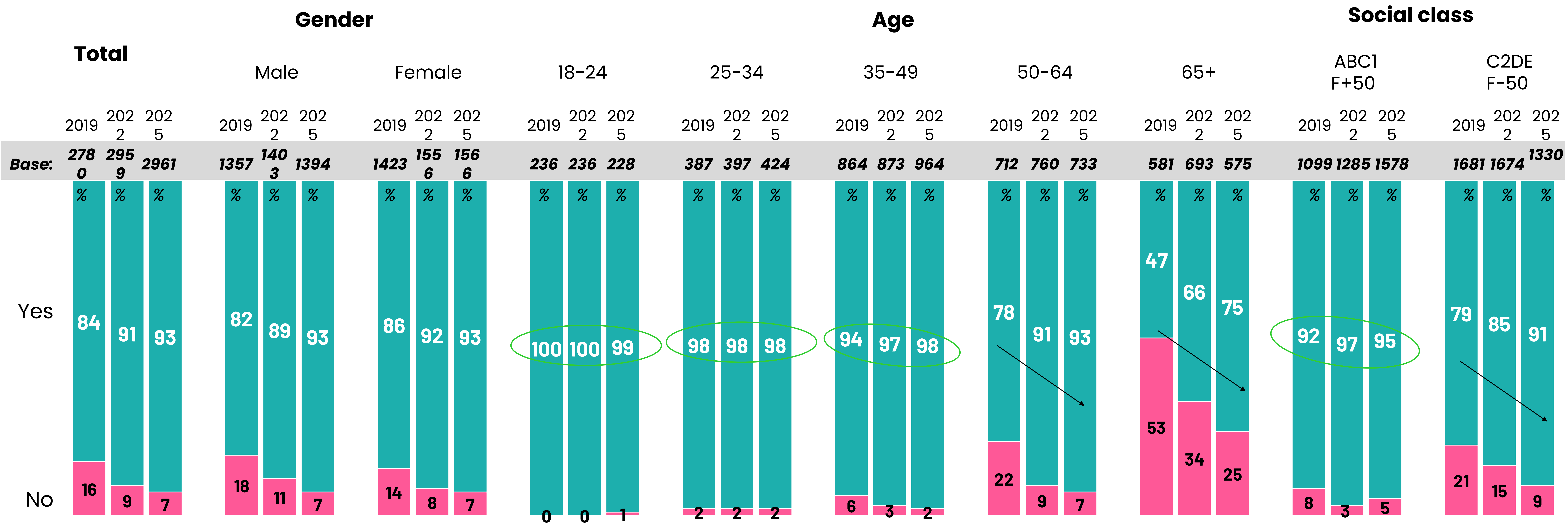
( ) = 2022



*Caution low base size

Smartphone ownership

The rate of smartphone ownership continues to grow albeit at a slower pace, given we are near saturation. Those over 65, though at a lower percentage compared to other age groups, are increasingly moving to smartphones, with gains also seen among working class cohorts.



Q11 Is your mobile phone a "smartphone"?
Base: All adults with mobile phones n = 2961

Type of smartphone owned

iPhones and Samsung remain the most owned smartphones, with increased ownership for both since 2022.

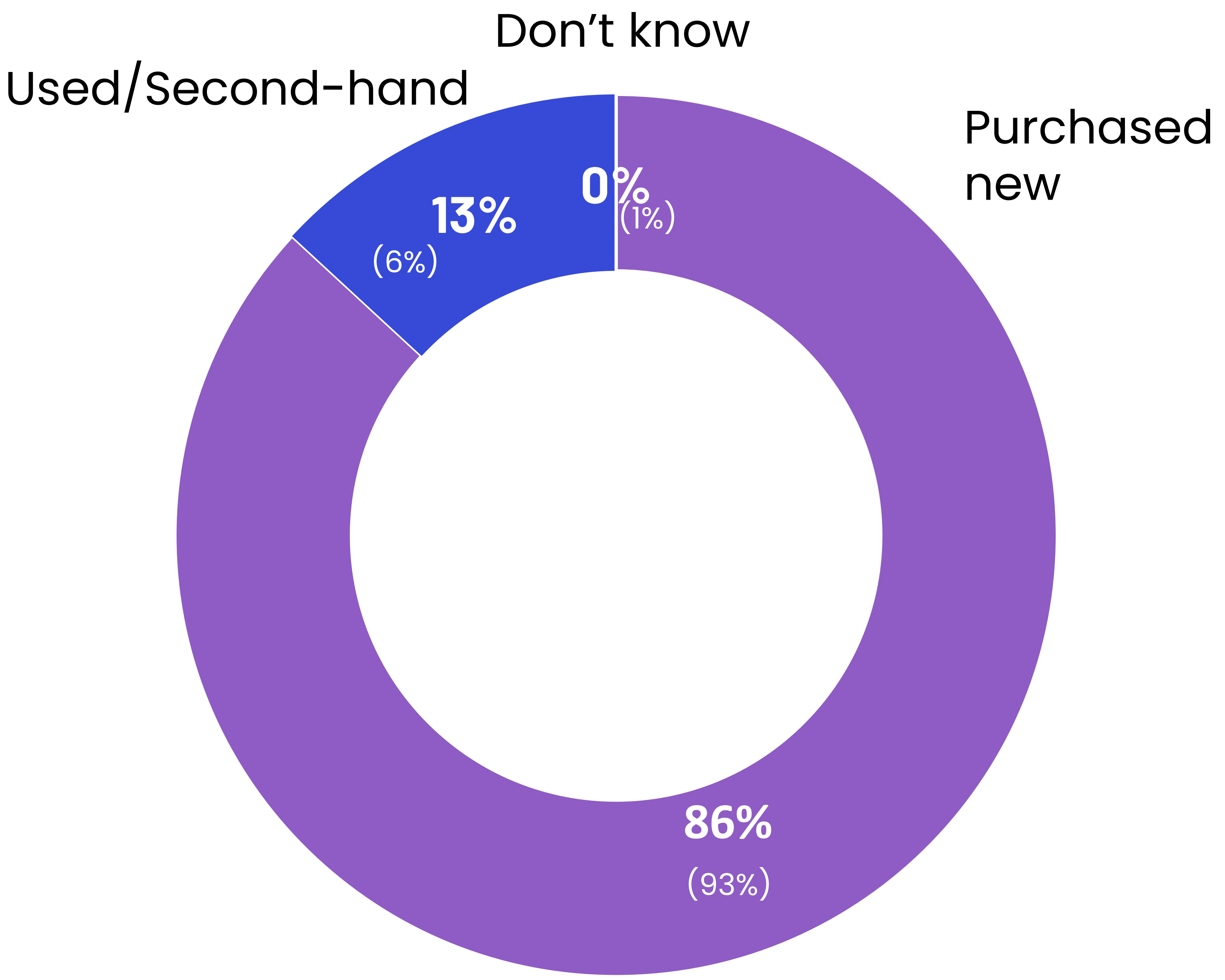
	2022 Total	2025 Total
Apple iPhone	40%	44%
Samsung Galaxy	37%	41%
Xiaomi (Redmi)	2%	3%
Google Pixel	-	2%
Huawei	10%	2%
Honor	-	1%
Motorola	-	1%
Nokia	1%	1%
OnePlus	-	1%
Oppo	1%	1%
Sony Xperia	1%	1%
Other	3%	3%

Q11a What kind of smartphone do you own?
Base: Own smartphone 2,751

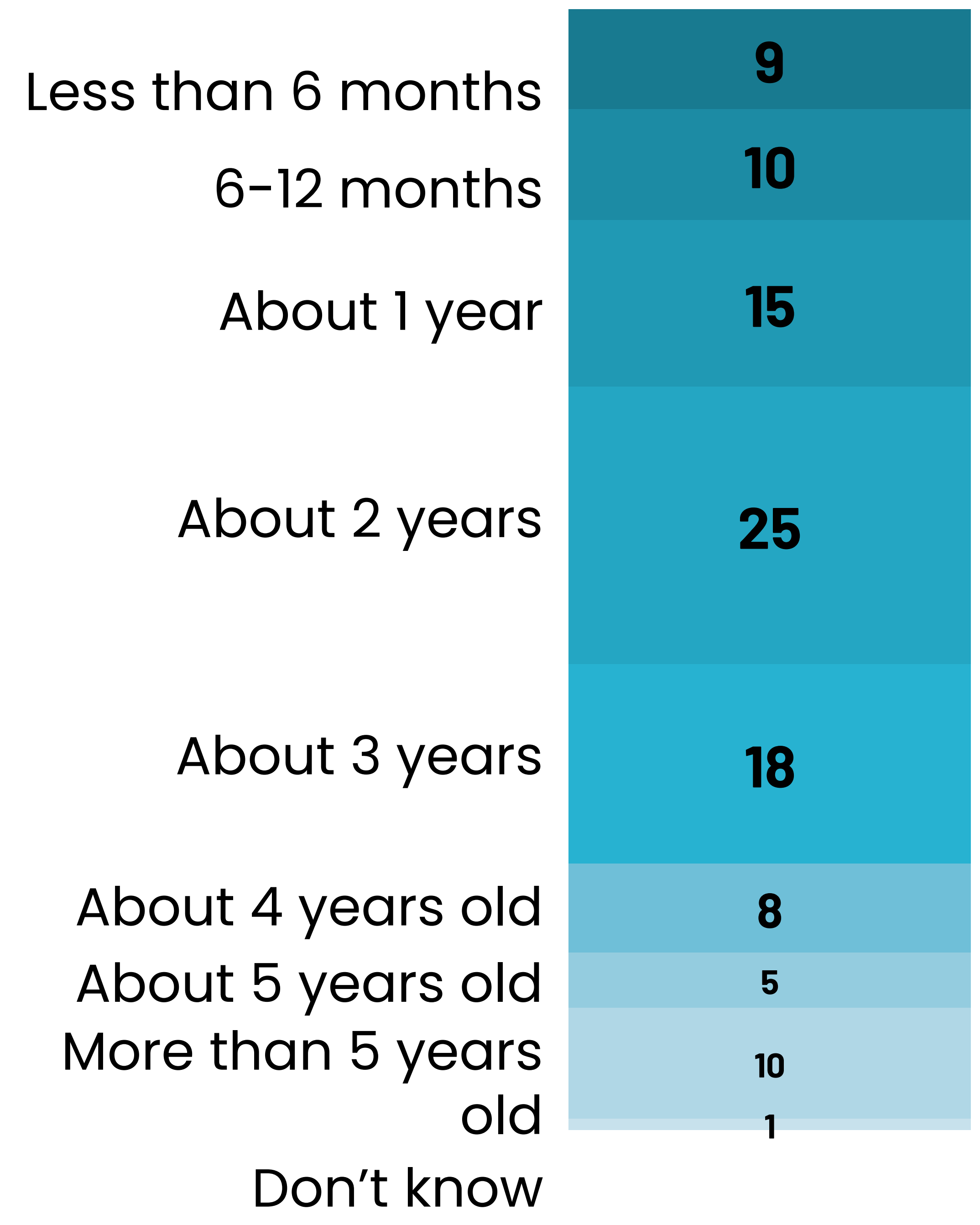
Level of second hand purchases & age of phone since purchase

Though the vast majority continue to buy new phones, the rate of second-hand purchasing has more than doubled, displaying growing popularity. Although this is a promising shift from a sustainability perspective, the majority of phones are 2 years old or less (3 in 5), indicative of relatively quick turnaround periods of ownership.

Purchased new or used/second-hand
%



Age of current phone
%



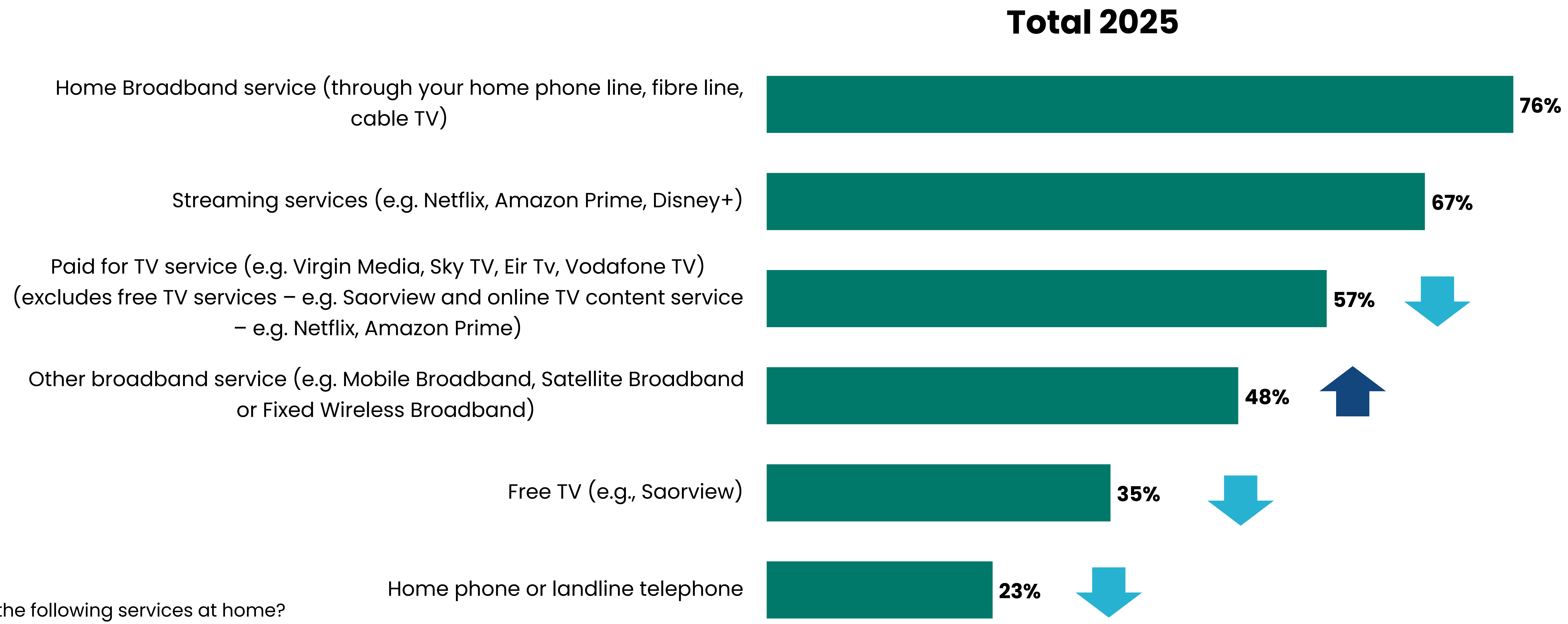
NET 2 years or less	59%
NET (3-5 Years)	31%

Q.12 Did you purchase your current mobile phone new or used/second-hand?
Q13 How long ago did you purchase your mobile phone?
Base: Have mobile: 2,961

Service Usage

There has been no increase in home broadband or streaming services (albeit a strong majority are using both), while there has been a significant decrease in those paying for a TV service (now 57%) and those using a landline (now 23%). Other broadband services have increased in usage, possibly due to introduction of new services in this space.

2019	2022
65%	76%
n/a	68%
70%	70%
40%	40%
n/a	39%
52%	36%



Q.3 Do you have any of the following services at home?
Base: All adults aged 18+: 2977

Service Usage x demographics

There are clear divisions by age, with lesser reliance on broadband and streaming services among those over 65, paired with increased usage of free TV and landlines. Customers from middle class backgrounds have more access to all paid broadband and TV services.

	Total	Gender		Age					Class			Region				Area	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Rest of Leinster	Munster	Connaught/Ulster	Urban	Rural
Base:	***2977***	***1402***	***1574***	***228***	***425***	***965***	***735***	***587***	***1583***	***1341***	***53***	***862***	***795***	***815***	***505***	***1991***	***986***
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Home Broadband service (through your home phone line, fibre line, cable TV)	76	77	75	71	75	79	80	68	82	70	67	78	79	74	69	77	73
Streaming services (e.g. Netflix, Amazon Prime, Disney+)	67	67	68	79	78	79	64	36	78	58	53	70	73	63	60	69	64
Paid for TV service (e.g. Virgin Media, Sky TV, Eir Tv, Vodafone TV) (excludes free TV services – e.g. Saorview and online TV content service – e.g. Netflix, Amazon Prime)	57	56	57	52	47	60	61	56	64	51	43	62	62	51	48	58	53
Other broadband service (e.g. Mobile Broadband, Satellite Broadband or Fixed Wireless Broadband)	48	47	49	56	50	52	47	37	53	44	40	55	45	44	49	48	48
Free TV (e.g., Saorview)	35	36	34	28	25	29	39	50	30	37	54	13	36	42	56	25	51
Home phone or landline telephone	23	24	23	14	9	14	28	50	23	22	43	26	21	20	28	23	25

Q.3 Do you have any of the following services at home?
Base: All adults aged 15+: 2,977

Reasons for having landline and mobile phone x segments

Among those with both landline and mobile, there have been declines in those noting a need to have landline for their broadband connection and those stating landline calls are cheaper. However, both remain in the top three factors for keeping landlines, alongside feeling more secure having a landline.

Reason	2019	2022	Total
I need the home/landline phone for my broadband connection/wifi…	28	31	26%
I feel secure having a home/landline phone	16	19	22%
Making calls with the home/landline phone is cheaper	30	24	17%
I use my home/landline phone for calls to other home/landline…	11	14	14%
My internet package includes free landline	18	13	13%
I need a home/landline phone for my business	7	9	8%
I never thought about / or got around to disconnecting the…	6	7	8%
I need the home/landline phone for my house alarm	5	9	7%
The coverage/signal quality of the home/landline phone is better than…	6	7	6%
I want to be contactable when I am not at home and that's why I also…	5	4	5%
It is too much hassle to disconnect from home/landline phone	4	4	4%
Others	12	11	11%
Don' know	3	1	2%

Q3a Why do you have both a home phone/landline phone and a mobile phone?
Base: All with Mobile & Landline: 691

Current mobile phone network provider x region

Vodafone and Three continue to hold the majority market share. However, there is a clear momentum behind some alternative providers, namely GoMo and 48. Vodafone customers are more likely to reside in rural areas, and Connacht / Ulster specifically.

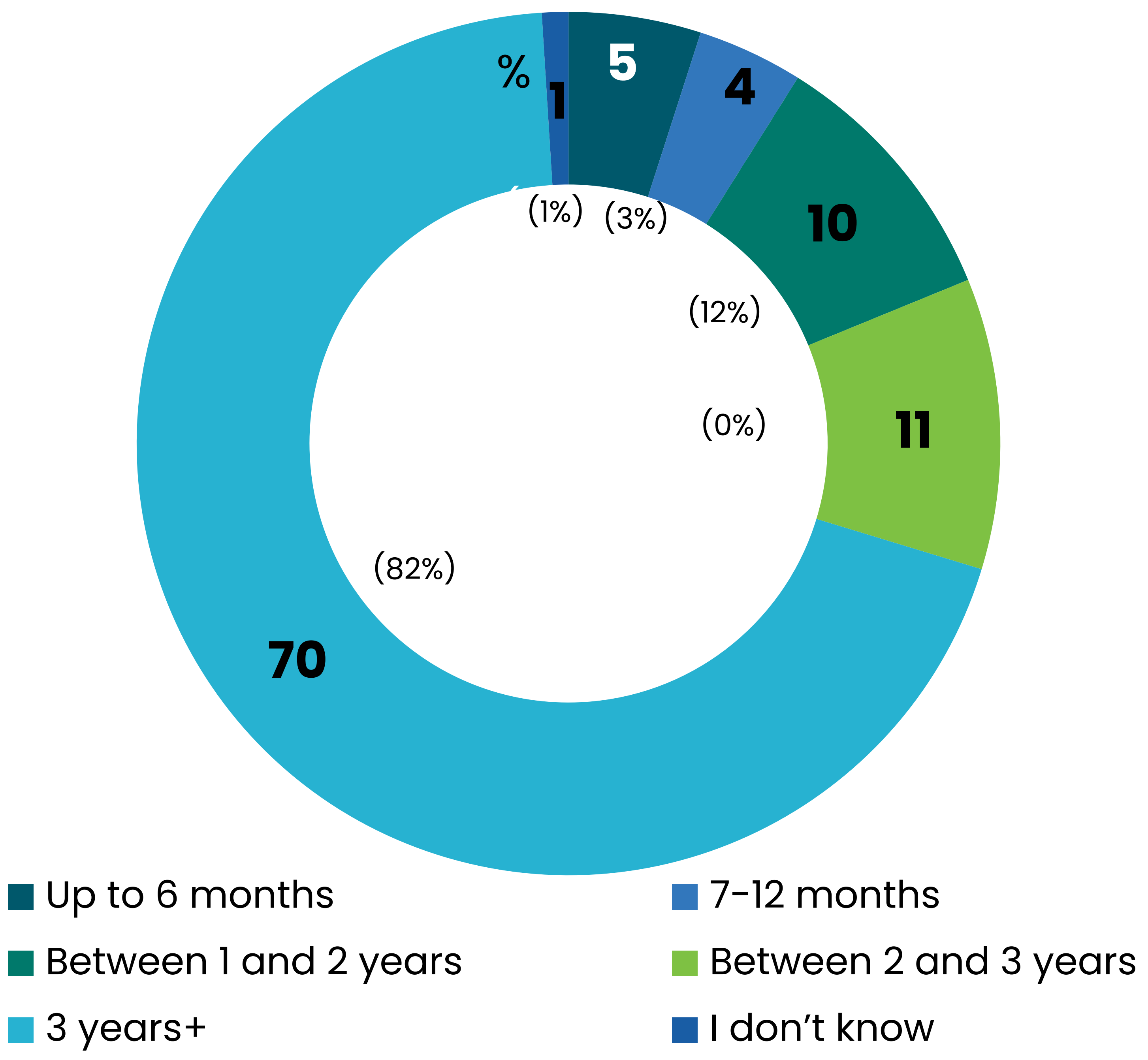
	Total 2019	Total 2022	Total	Region: Dublin	Region: Rest of Leinster	Region: Munster	Region: Connaught/Ulster	Region: Ex. Dublin	Area: Urban	Area: Rural
				859	*791*	*806*	*505*	*2102*	*1981*	*980*
				%	%	%	%	%	%	%
Vodafone	(33)	(33)	33%	28	34	33	38	35	30	37
Three Mobile (including O2)	(31)	(31)	23%	22	22	27	22	24	23	24
eir	(22)	(22)	18%	17	20	16	17	18	17	19
Tesco Mobile	(10)	(10)	8%	9	8	9	6	7	9	6
GoMo	(N/A)	(2)	7%	7	6	6	9	7	7	7
48	(2)	(1)	4%	5	5	3	2	4	4	3
Virgin Mobile	(N/A)	(1)	2%	5	2	1	0	1	3	1
Lyca	(1)	(0)	2%	3	1	2	4	2	3	1
Sky Mobile	(N/A)	(N/A)	1%	1	1	1	1	1	1	0
Postfone	(0)	(0)	1%	1	1	1	1	1	1	1
Clear Mobile	(N/A)	(0)	0%	0	0	0	-	0	0	-
Other	(N/A)	(0)	0%	1	-	0	0	0	0	0
I don't know	(0)	(0)	0%	0	0	0	0	0	0	0

ComReg.ie Q.4 Who is your current mobile phone network provider?
Base: Have mobile: 2,961

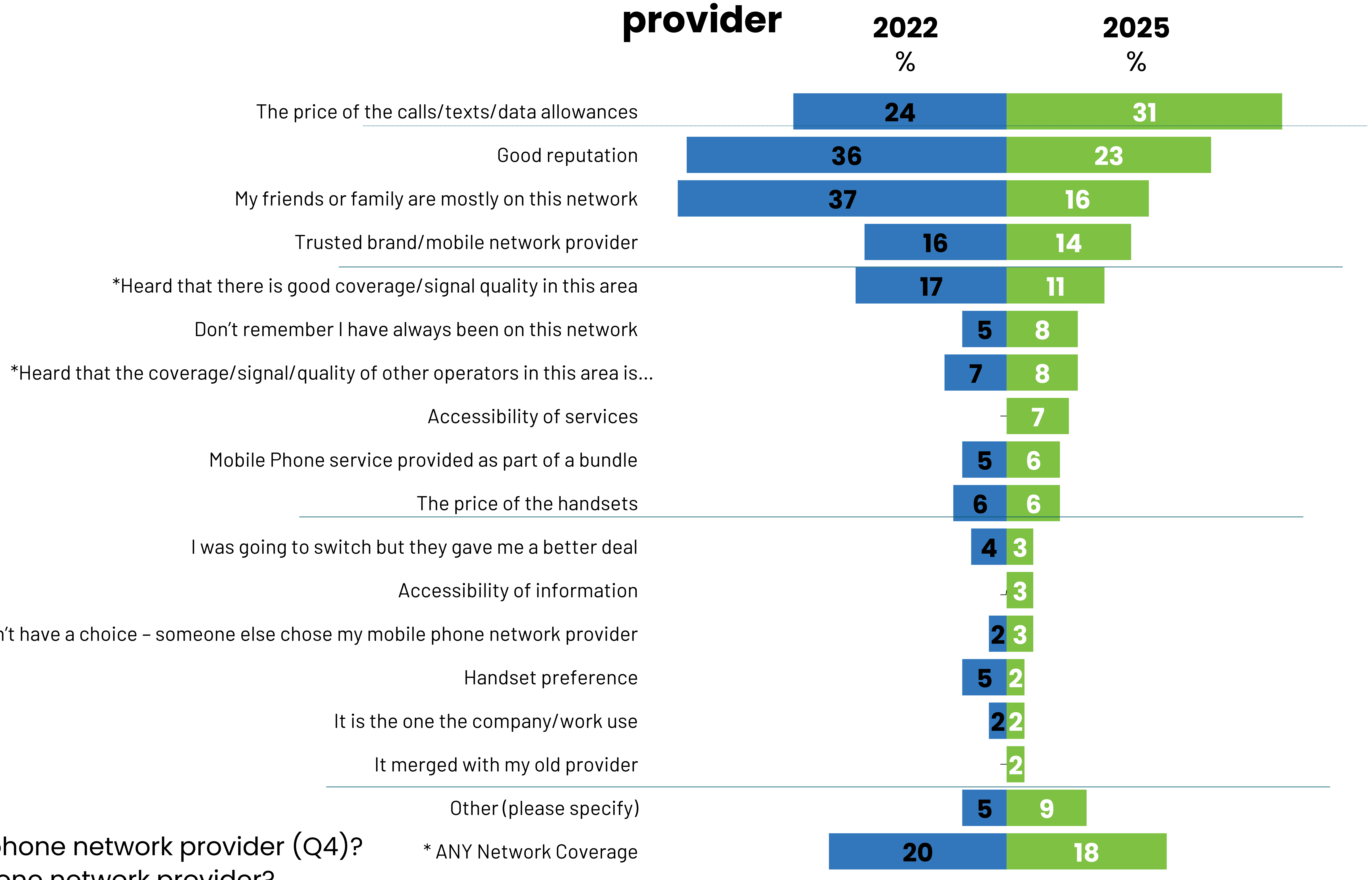
Duration with and reasons for choosing current mobile phone network provider

The mobile market remains sticky, with minimal switching in recent years (4 in 5 have not switched in the last 2 years). Price is now the most cited reason for selection of provider following a significant increase in mentions. There is decreased emphasis on reputation and family and friends being on the same network (albeit they remain in the top three).

Length of time with current provider



Reasons for choosing provider



( ) = 2022

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Q.4a How long are you with your current mobile phone network provider (Q4)?
Q.4b Why did you choose your current mobile phone network provider?
Base: Have mobile: 2961

Reasons for choosing current mobile phone network provider x demos

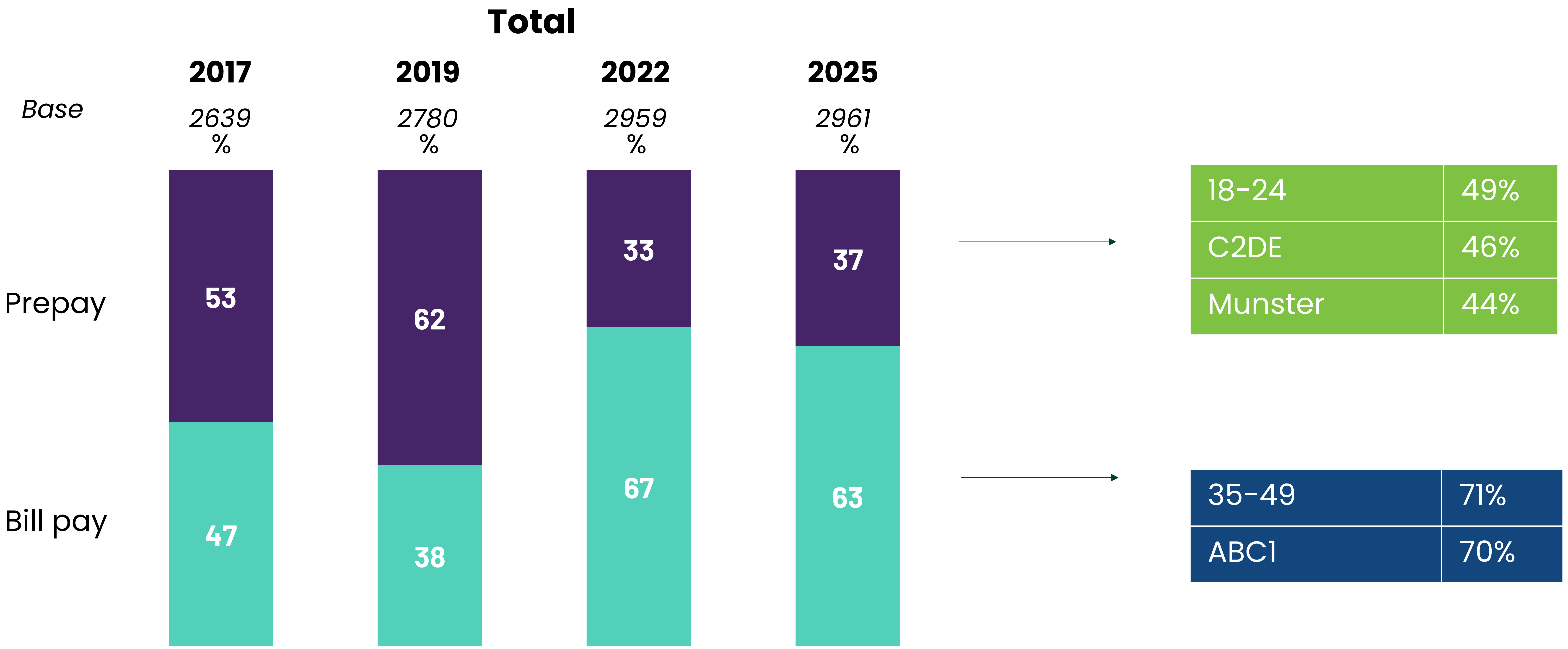
	Total	Gender		Age					Class	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1F1	C2DEF2
Base:	***2961***	***1394***	***1566***	***228***	***424***	***964***	***733***	***575***	***1619***	***1342***
	%	%	%	%	%	%	%	%	%	%
The price of the calls/texts/data allowances	31	35	28	33	36	34	30	24	32	31
Good reputation	23	22	24	20	24	23	22	27	22	24
My friends or family are mostly on this network	16	15	17	26	16	12	13	18	16	17
Trusted brand/mobile network provider	14	14	13	14	14	12	14	16	14	13
**Heard that there is good coverage/signal quality in this area*	*11*	*12*	*11*	*12*	*10*	*13*	*13*	*7*	*12*	*10*
**Heard that the coverage/signal/quality of other operators in this area is poor/unreliable*	*8*	*8*	*9*	*7*	*9*	*8*	*8*	*9*	*8*	*8*
Don't remember I have always been on this network	8	8	8	6	8	5	11	9	7	9
Accessibility of services	7	7	7	11	6	7	8	6	7	7
Mobile Phone service provided as part of a bundle	6	5	6	3	4	6	9	4	5	6
Accessibility of information	3	3	3	2	3	3	3	2	2	3
I didn't have a choice – someone else chose my mobile phone network provider	3	3	3	5	1	3	2	4	3	2
Handset preference	2	1	2	2	2	3	2	1	2	2
It is the one the company/work use	2	2	1	1	1	3	3	1	3	1
It merged with my old provider	2	2	2	1	1	2	3	1	2	2
Other	9	9	9	6	8	8	10	10	9	8
***ANY Network Coverage Outage**	**18**	**19**	**18**	**16**	**19**	**21**	**20**	**16**	**19**	**17**

*** small base size*

Q.4b Why did you choose your current mobile phone network provider? Base: Have mobile: 2,961

Plan/package a prepay package

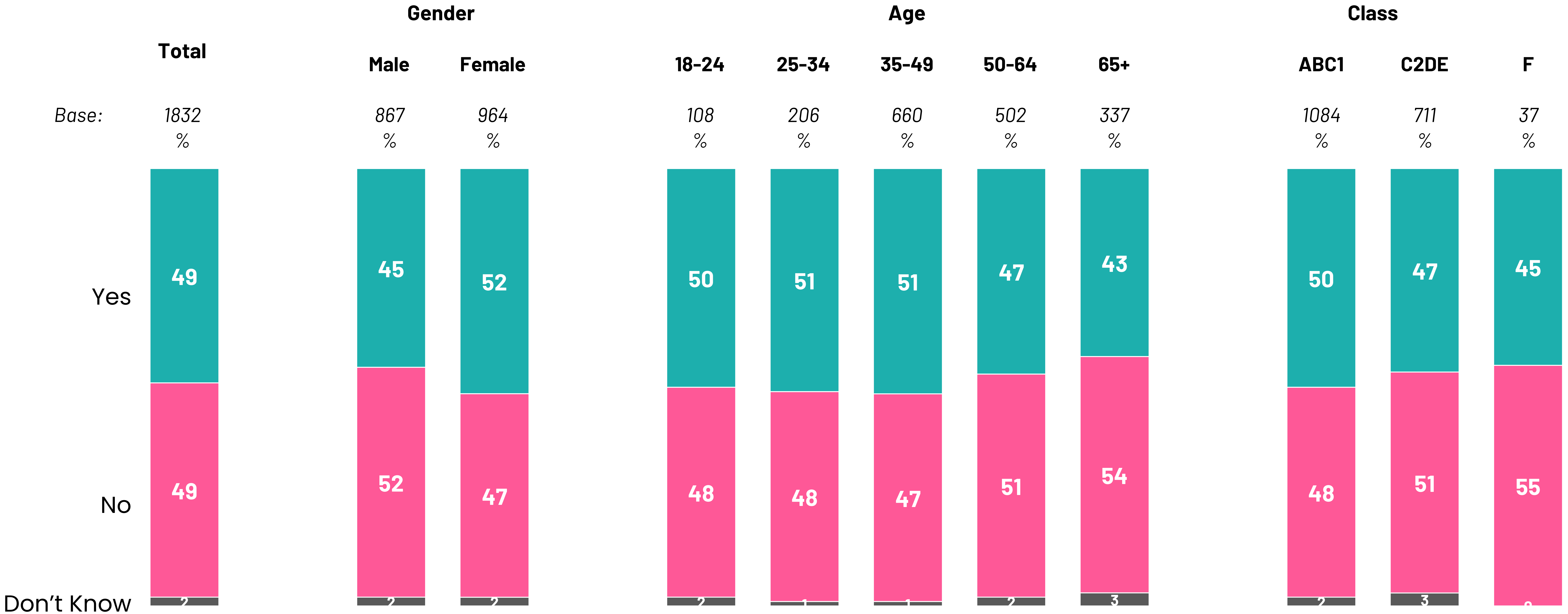
3 in 5 are bill pay customers, which increased to 7 in 10 middle class and 35-49 year olds. Prepay is much more prevalent among the under 25 cohort as well as working class cohorts.



Q5 Is your mobile plan/package a prepay package (where you buy credit and top up before you can make a call) or bill pay package (where you have a contract with your operator and subsequently receive a bill for the services you used in the previous month)?
Base: Have mobile: 2961

Incidence of phones included in billpay contracts

There is a split in terms of inclusion of a phone, with half stating they have it included and half saying they do not. There is no significant differentiation by demographics here.

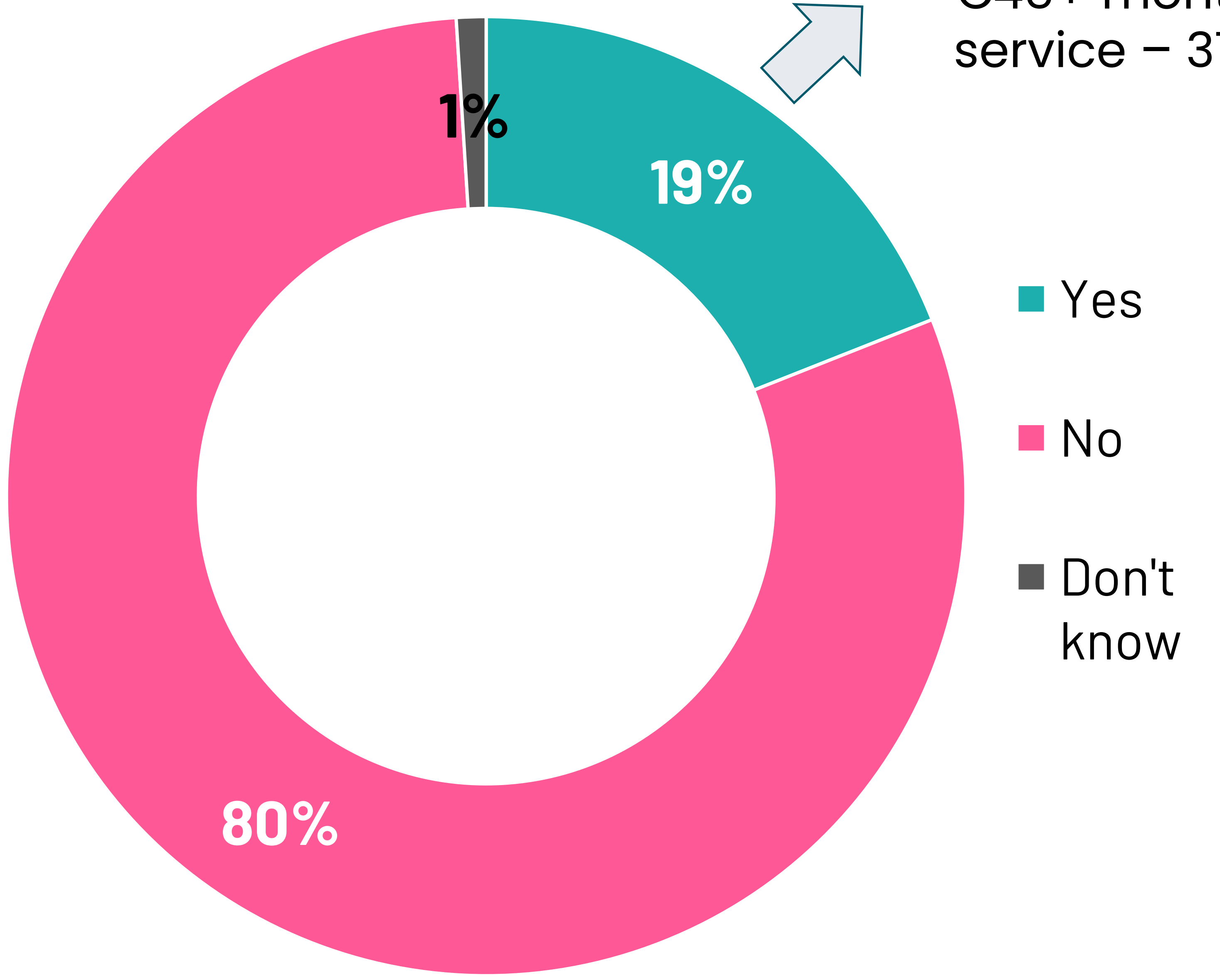


Q5a Is your mobile phone included in your payment contract? (by this we mean that you are paying for your handset as part of your contract)
Base: All adults on billpay – n=1,832

Incidence of mobile service being included in bundles

1 in 5 cite having their mobile service included in a bundle, with the most common service pairing being broadband (91%). These bundles tend to be more expensive and more concentrated among billpay customers.

Occurrence of Bundles

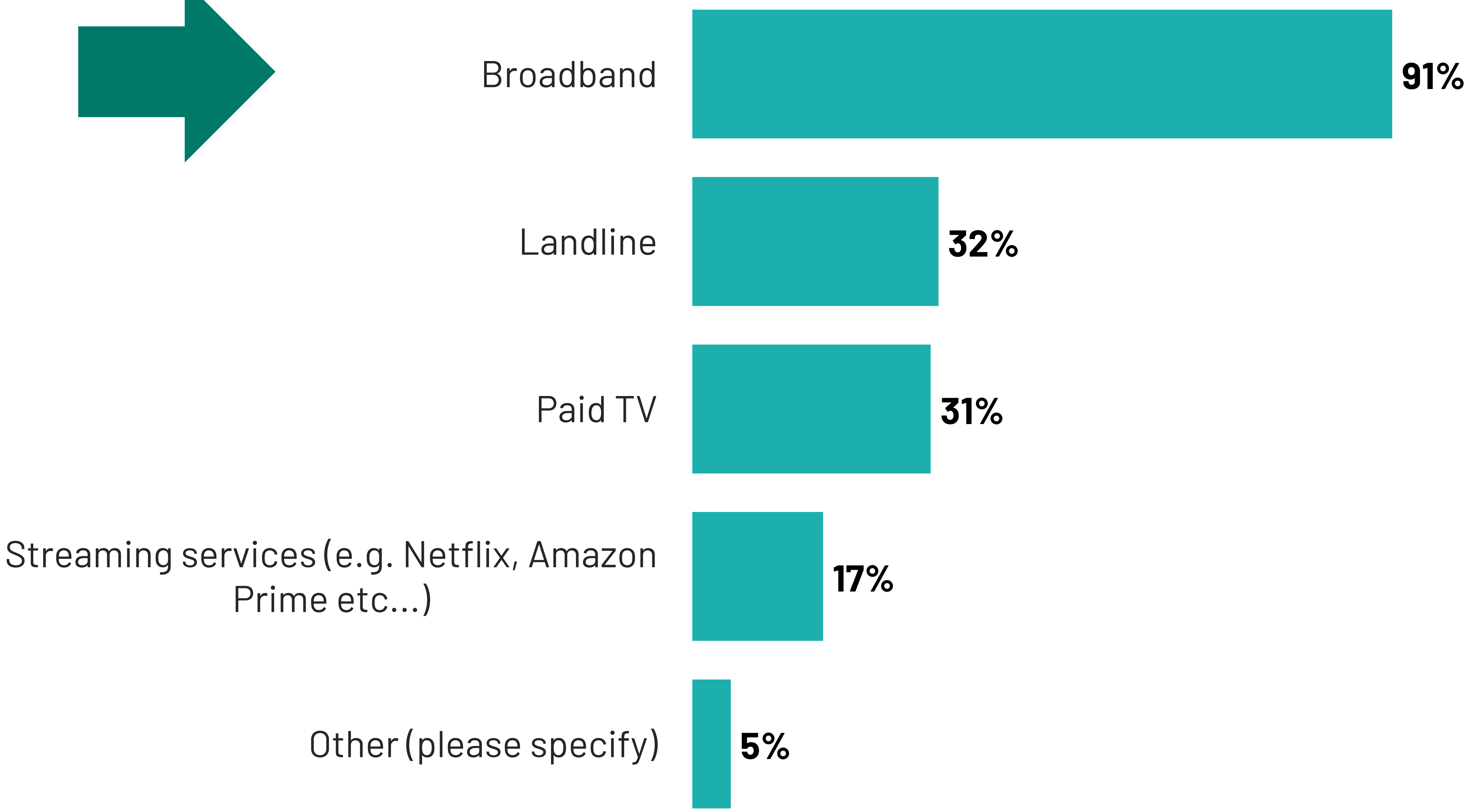


More likely to be:

Billpay – 27%

€45+ monthly cost of service – 37%

What other services are included in the bundle (Base: 594)



Q.6. Is your mobile subscription part of a bundle with other services for an overall fixed price? (e.g., mobile, broadband, home landline phone, paid TV, etc, together for one price each month).
Q.6a What is included in this bundle? (Base n-594)
Base: Have mobile: 2961

Overview of bundles x mobile phone provider

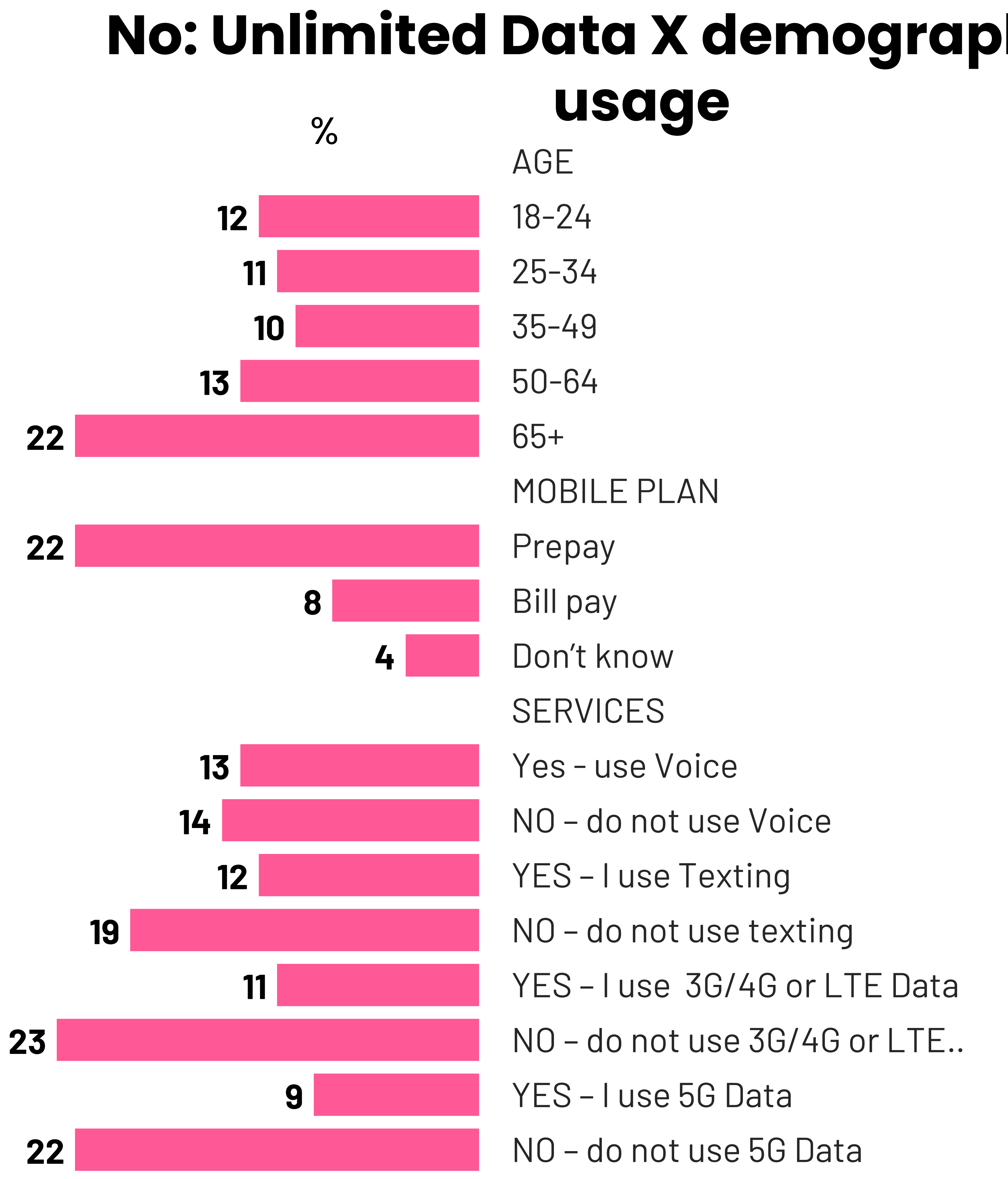
Given the high rate of bundling with broadband, it is unsurprising that eir and Virgin customers are more likely to have bundled their mobile subscription.

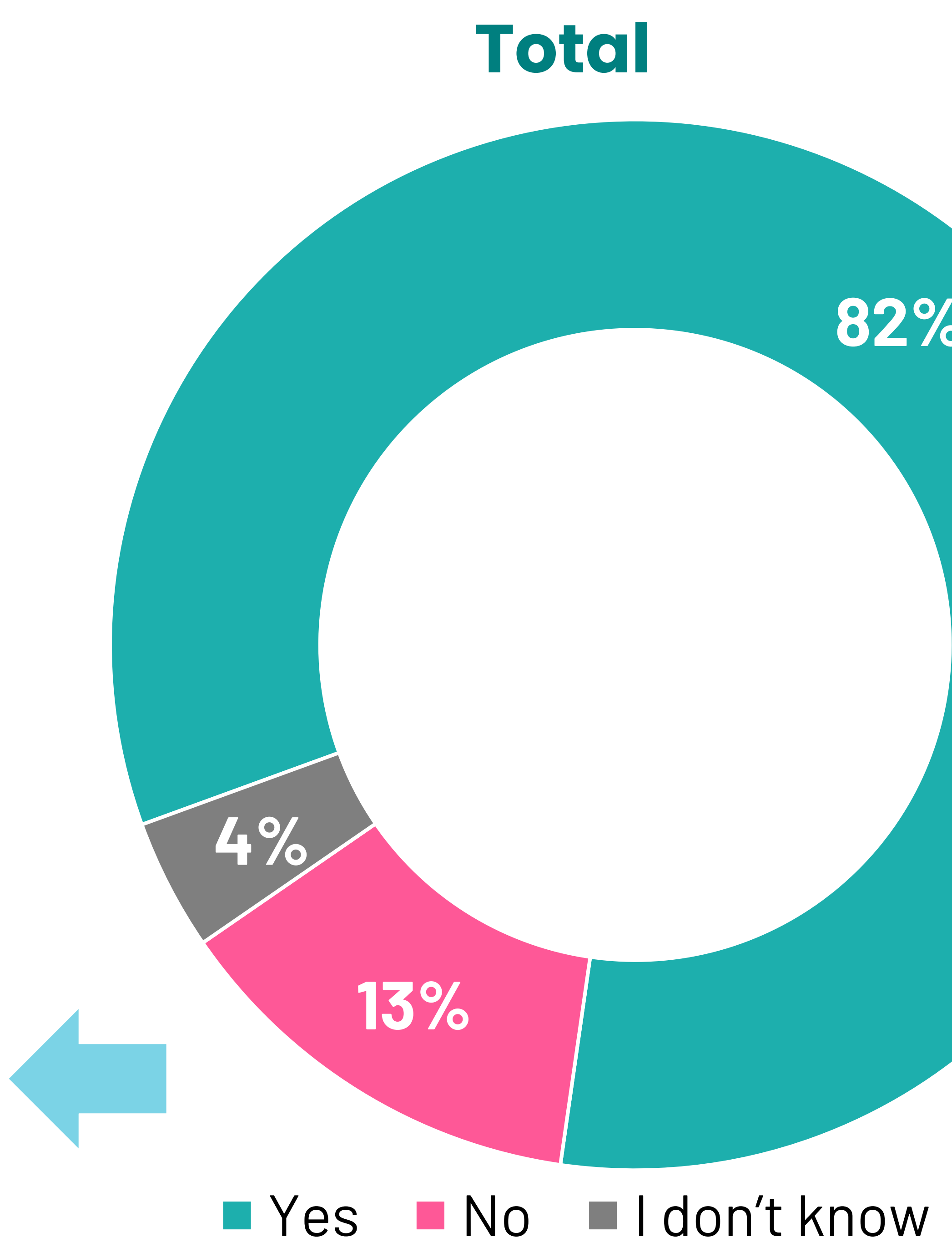
	Total	Mobile Phone Provider								
		Vodafone	Three Mobile (including 02)	eir	GoMo	Tesco Mobile	Virgin Mobile	Sky Mobile	48	Lyca
BUNDLING?										
Base:	***2961***	***945***	***598***	***611***	***220***	***285***	***100***	***44***	***89***	***29***
	%	%	%	%	%	%	%	%	%	
Yes	19	19	7	48	8	6	37	29	3	13
No	80	80	92	51	91	93	61	71	94	87
Don't know	1	1	1	1	1	1	3	-	3	-
BUNDLE TYPE										
Base	594	184	45	280	9	18	36	12	3	3
	%	%	%	%	%	%	%	%	%	
Broadband	91	92	84	97	94	55	96	100	80	-
Landline	32	27	18	37	29	39	42	18	-	45
Paid TV	31	25	26	35	15	29	69	74	-	-
Streaming services (e.g. Netflix, Amazon Prime etc...)	17	17	17	15	15	31	17	31	-	35
Other	5	6	11	4	-	10	4	-	20	20

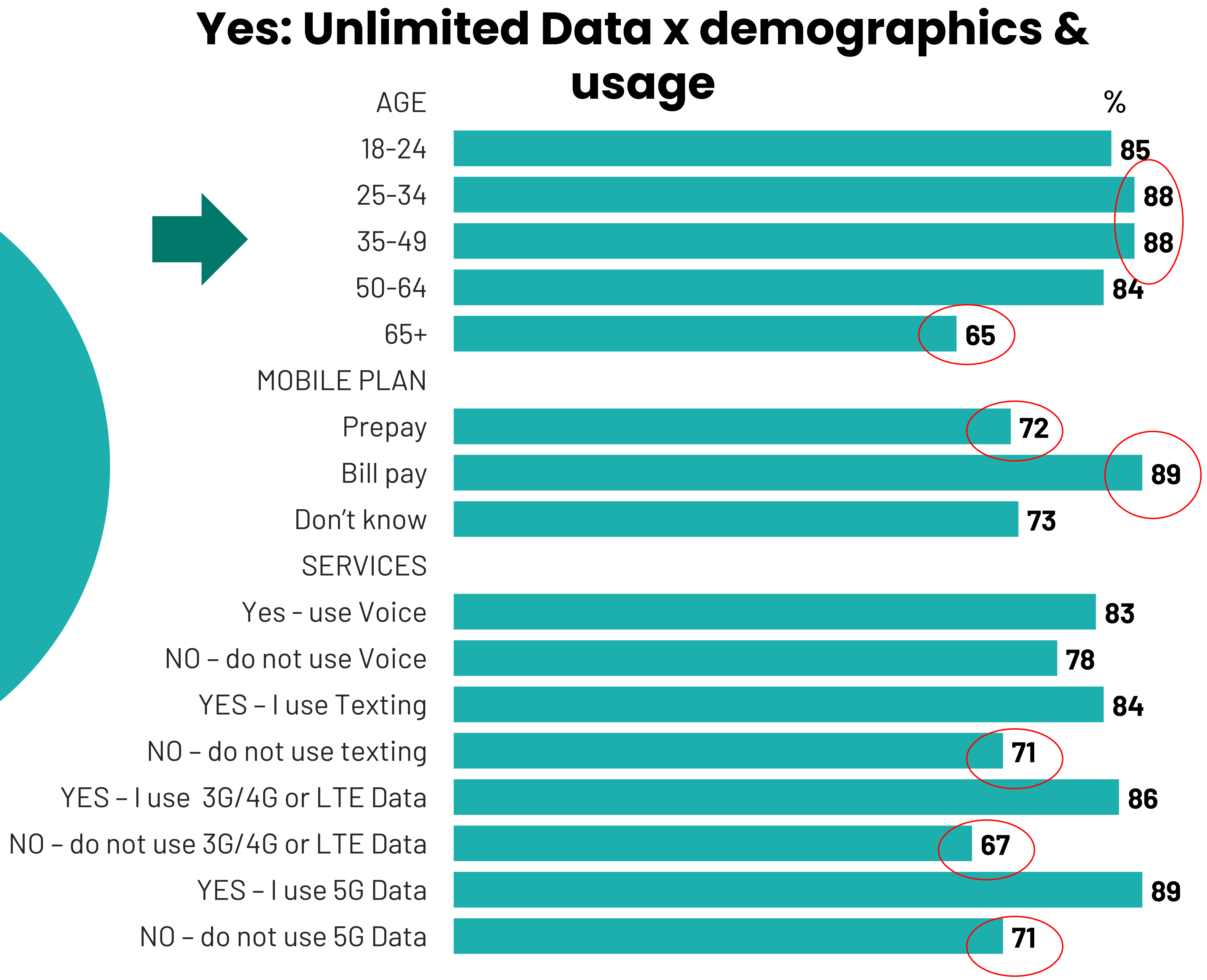
Q.6. Is your mobile subscription part of a bundle with other services for an overall fixed price? (e.g., mobile, broadband, home landline phone, paid TV, etc, together for one price each month).
Q.6a What is included in this bundle? Base 595
Base: Have mobile: 2961

Rate of unlimited data plans

The vast majority have unlimited data. This is lower among over 65s and prepay customers. Unsurprisingly, there are much higher rates of customers that use data citing unlimited data.



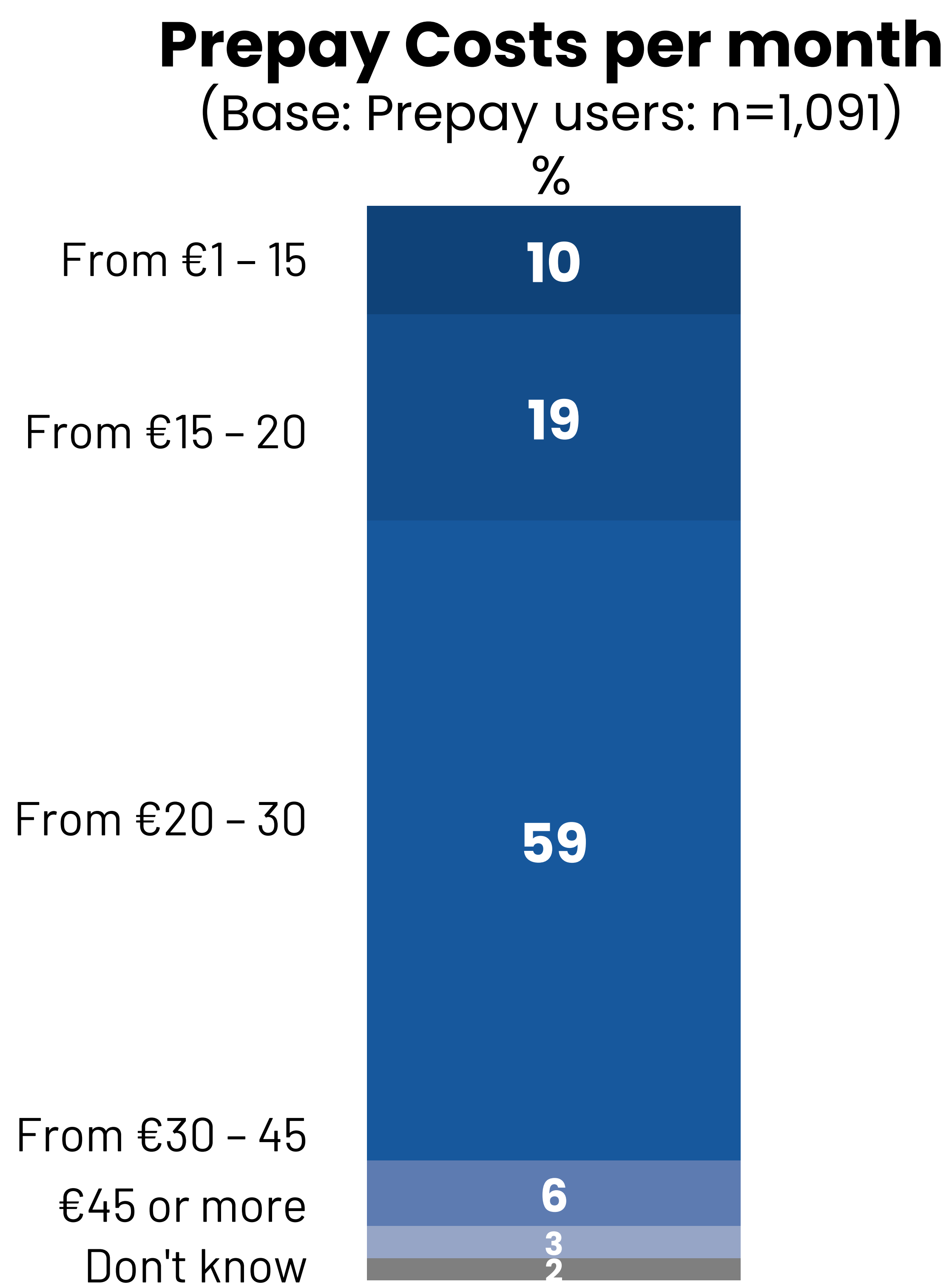




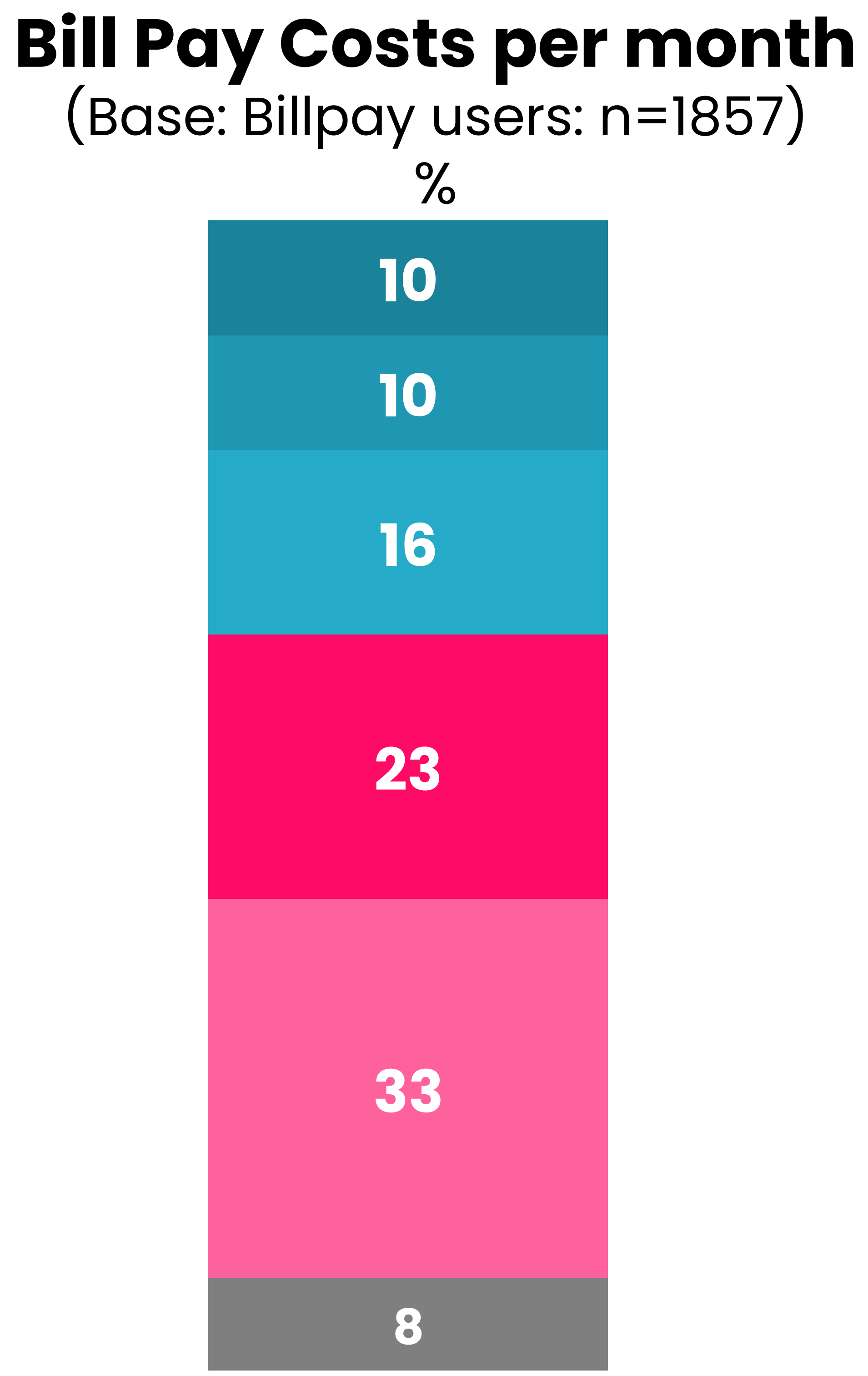
Q7a Do you have unlimited data as part of your current mobile data plan?
Base: All have mobile: n=2961

Typical spend on prepay / bill pay services

Prepay customers price point is notably lower than billpay, with the average monthly cost being just under €20, compared to just under €40 for billpay.



2025 Mean:	**€19.84**
2022 Mean:	**€20.43**



2025 Mean:	**€39.75**
2022 Mean:	**€37.95**

While prepay gets cheaper, bill pay is becoming more expensive

Q7b. In a typical month, how much does your personal mobile phone plan cost with {selected mobile provider}?Exclude any roaming changes or the cost of other services if you are bundled in with home/landline or broadband.
Base: All have mobile: 2961

Typical spend on billpay services

	Total	Gender		Age					Class	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE
Base:	***1857***	***881***	***975***	***110***	***210***	***668***	***508***	***342***	***1129***	***728***
	%	%	%	%	%	%	%	%	%	%
From 1 to 15	10	10	9	15	7	9	9	11	9	10
From 15 to 20	10	11	9	11	10	11	11	8	10	9
From 20 to 30	16	17	16	18	18	12	16	19	15	18
From 30 to 45	23	23	24	17	26	24	22	26	24	21
45 or more	33	32	35	24	34	39	36	26	33	34
Don't know	8	7	8	15	5	5	6	10	8	8
Mean	**39.75**	**38.28**	**41.18**	**34.46**	**38.95**	**40.99**	**40.95**	**39.72**	**39.14**	**40.57**

Q.7b In a typical month, how much does your personal mobile phone plan cost with {selected mobile provider}? Exclude any roaming changes or the cost of other services if you are bundled in with home/landline or broadband.
Base: All have mobile on billpay: 1857

Typical spend on prepay services

	Total	Gender		Age					Social Class	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE
Base:	***1091***	***507***	***584***	***112***	***213***	***296***	***222***	***231***	***480***	***611***
	%	%	%	%	%	%	%	%	%	%
From 1 to 15	10	11	9	15	10	10	7	7	12	8
From 15 to 20	19	20	19	18	19	17	24	18	20	19
From 20 to 30	59	58	60	57	60	61	58	63	56	62
From 30 to 45	6	7	6	4	7	8	8	5	6	7
45 or more	3	3	2	3	3	2	2	3	3	2
Don't know	2	2	2	2	1	2	1	3	3	1
Mean	**19.84**	**19.82**	**19.86**	**19.57**	**19.58**	**19.99**	**19.95**	**20.33**	**19.98**	**19.83**

Q.7b In a typical month, how much does your personal mobile phone plan cost with {selected mobile provider}? Exclude any roaming changes or the cost of other services if you are bundled in with home/landline or broadband.
Base: All have mobile on prepay: 1091

Ability to afford the mobile phone service

The vast majority have no issues paying for the mobile service, particularly middle-class cohorts. Those with a disability show higher rates of difficulty, which is an area that should be monitored moving forward.

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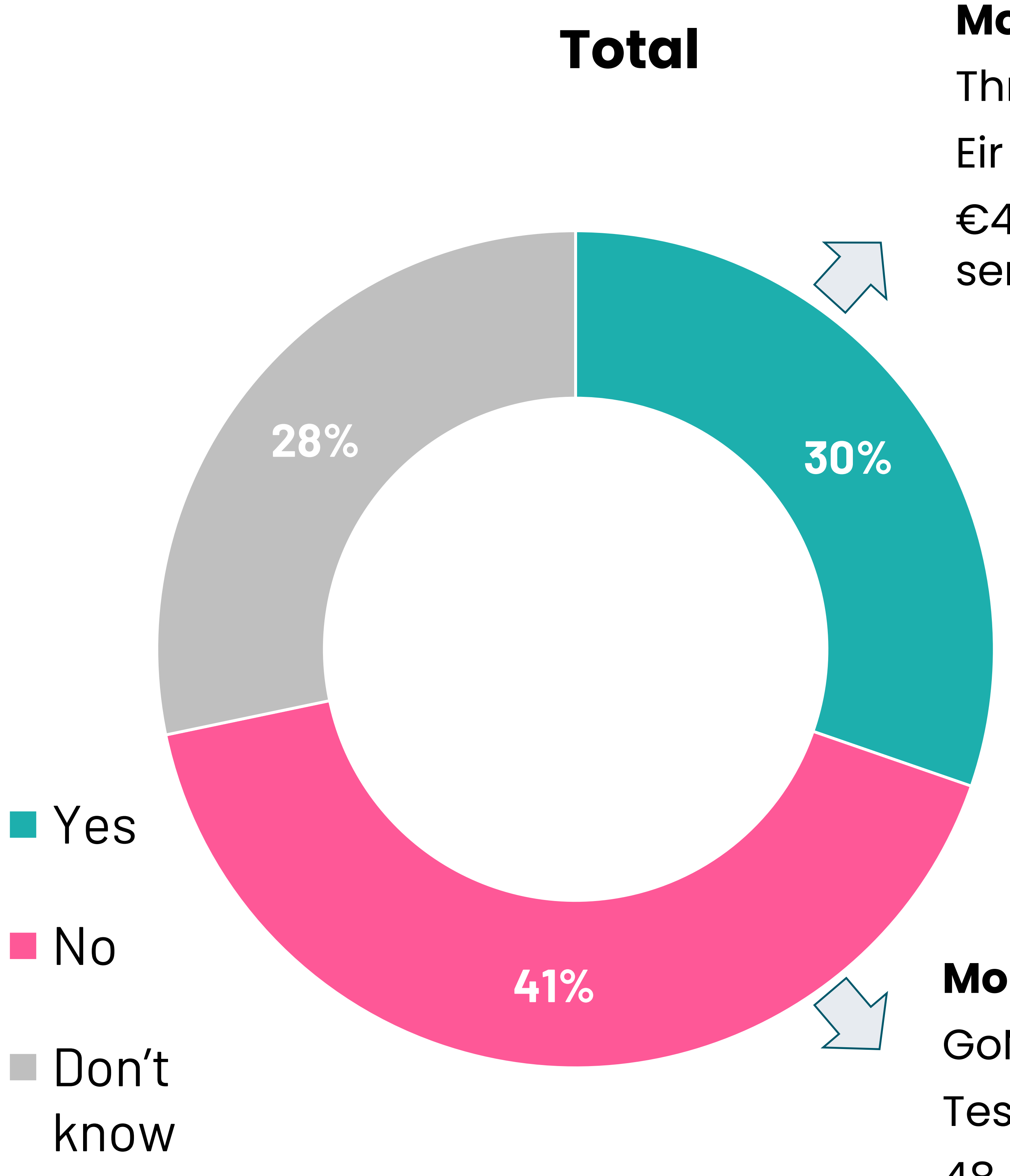
Q8 How would you rate your ability to afford your mobile phone service?
Base: All have mobile: 2,961

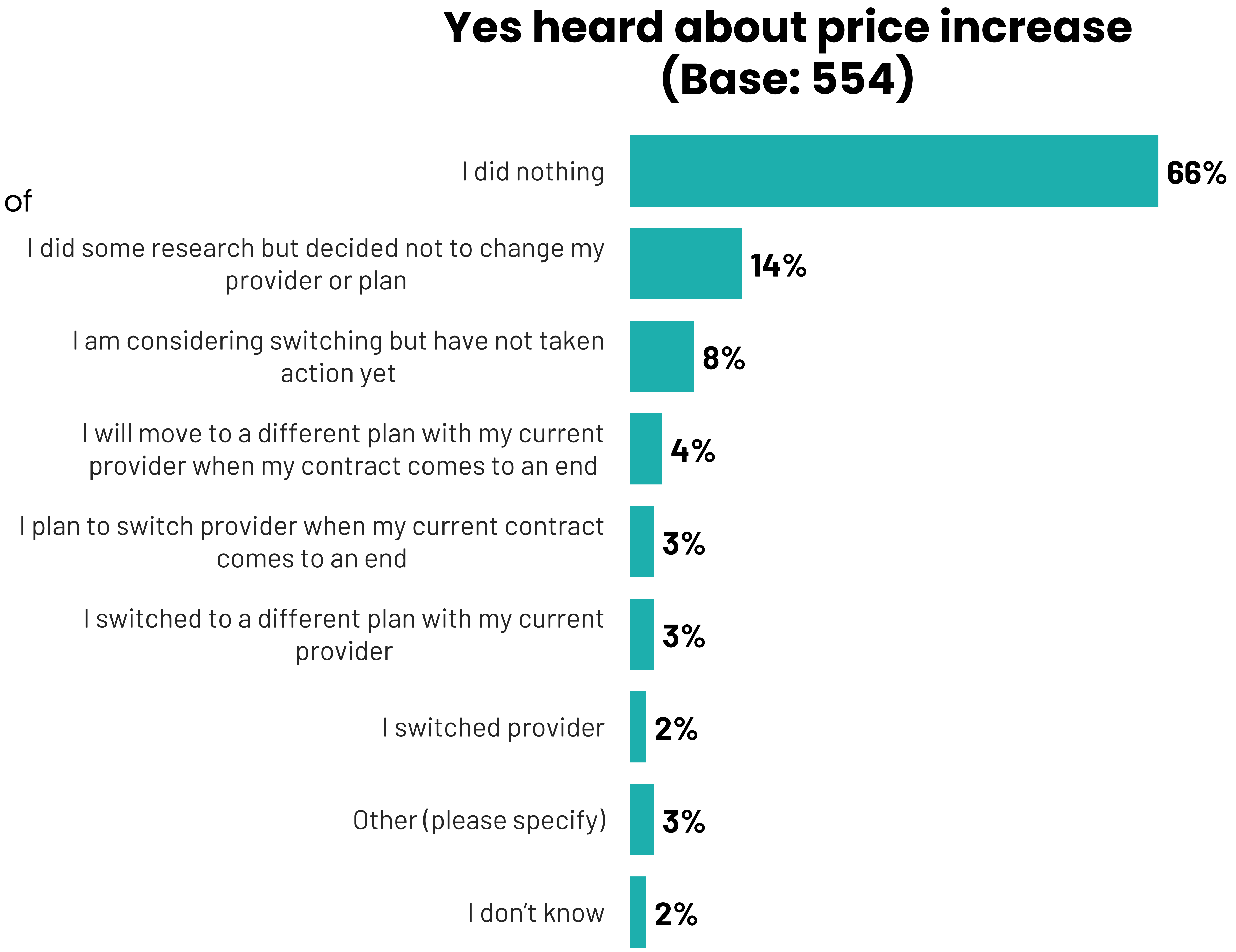
Experience of in-contract price increases

3 in 10 have claimed to have had an in-contract price increase, with Three and Eir customers more likely to cite these increases. 2 in 3 of those experiencing price increases are not doing anything about it, which may be due to customers' inability to exit a contract without paying an early termination fee.



More likely to be:
Three – 38%
Eir – 36%
€45+ monthly cost of service – 46%

More likely to be:
GoMo – 75%
Tesco – 65%
48 – 65%
Virgin – 60%

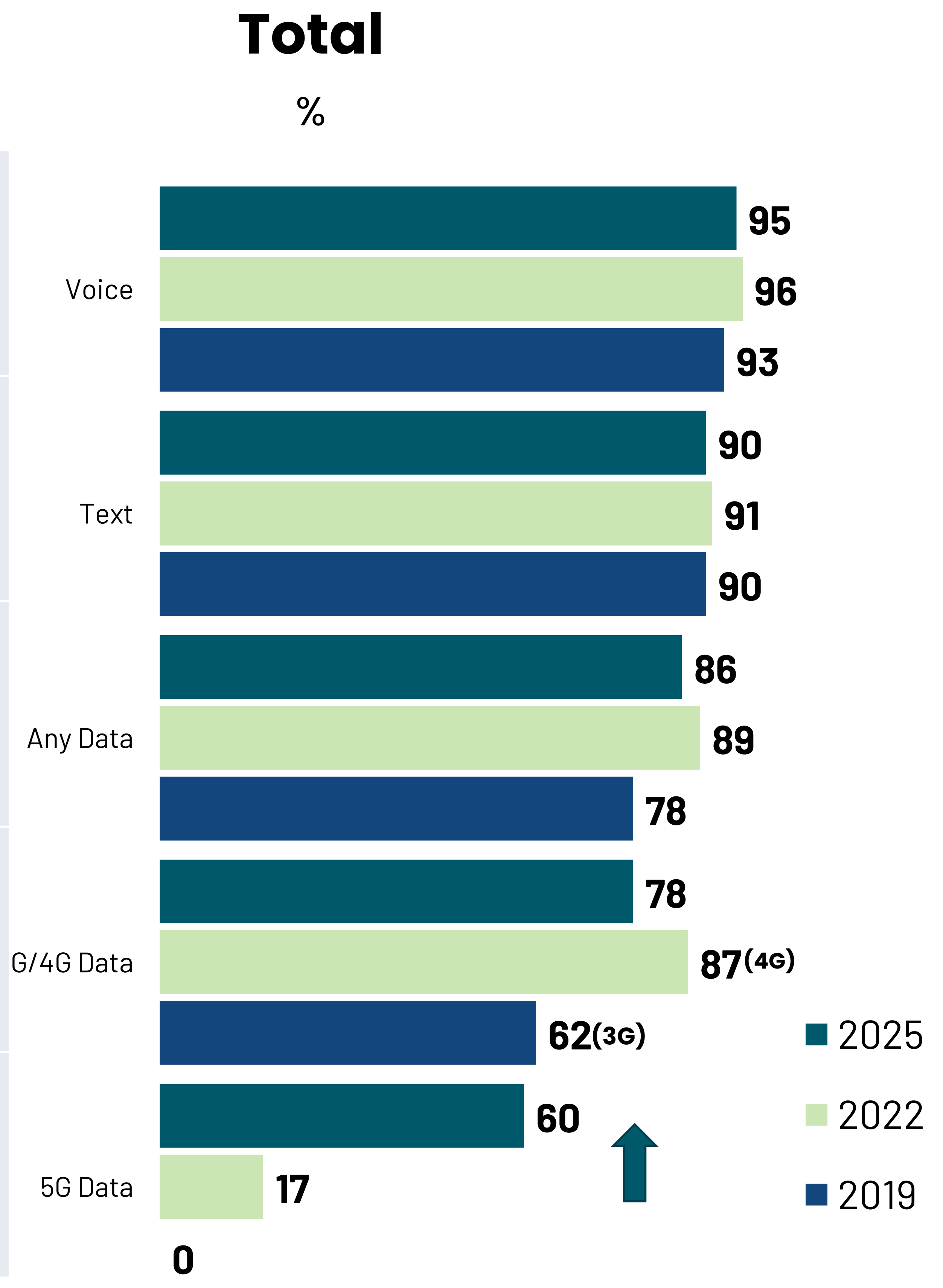


Q9 Does your mobile plan include an in-contract inflation linked price increase?
Q10 Which of the following best describes what you did as a result of hearing about an in-contract price increase (not including the end of a discount period), by your mobile provider in the past 12 months?
Base: All with billpay n- 1832

SERVICE USAGE & SATISFACTION

Use of various services on mobile phone

Data usage remains steady; however, usage is moving toward 5G, with significant increases here, paired with decreased 3G/4G usage. Much like previous waves, those over 65 are more likely to rely more on traditional voice and call services, with less utilisation of data. Those in Dublin are using 5G more than elsewhere in Ireland.



	Gender		Age					Social Class		Region			
	Male	Female	18-24	25-34	35-49	50-64	65+	ABC1F1	C2DEF2	Dublin	Rest of Leins	Munster	Connau/Ulster
	1394	1566	228	424	964	733	575	1619	1342	859	791	806	505
	%	%	%	%	%	%	%	%	%	%	%	%	%
Voice	95	95	91	95	95	97	97	95	96	92	97	95	97
Text	89	91	90	89	92	93	85	91	89	88	93	91	89
Any Data	**86**	**85**	**96**	**95**	**96**	**86**	**56**	**90**	**81**	**90**	**88**	**81**	**83**
3G/4G Data*	79	78	85	87	85	79	54	81	76	76	80	80	76
5G Data**	62	58	69	73	69	53	34	66	53	68	61	59	44

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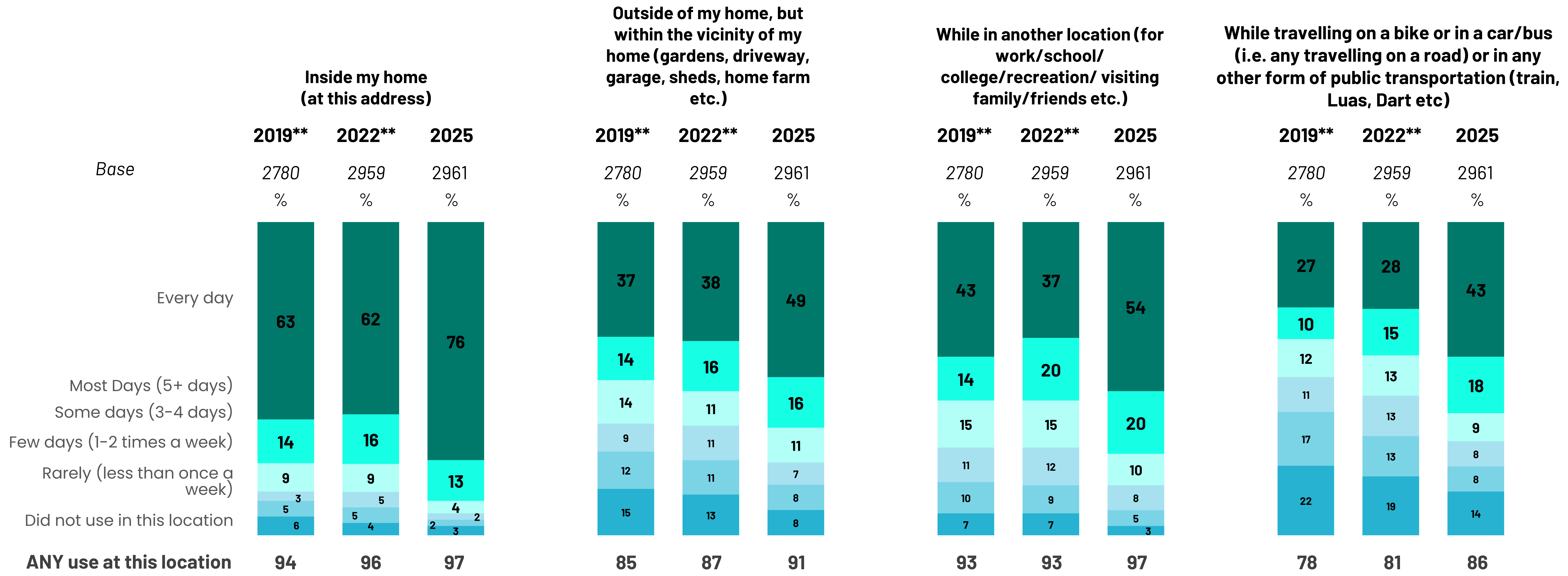
2019: Q.10 On your mobile phone which of the following do you use and pay for?
2022: Q.10 On your mobile phone which of the following do you use?
2025: Q.7 On your mobile phone which of the following do you use?
Base: All have mobile: n=2,961

**Note 3G/4G not combined in 2019*

***Note No 5G in 2019*

Frequency of using mobile at various locations during past week

Incidence of use at various locations has increased across all usage types, likely impacted by the change in question wording to encompass a more general mobile phone usage. 3 in 4 note they use their phone daily in the home, with circa half noting usage in the garden and other locations.



ComReg.ie Q.16 Thinking back on the past week, how often in the following locations, did you typically use your mobile :
Base: All have mobile: 2961

*** Note question wording change***

Daily usage of your mobile phone x demographics

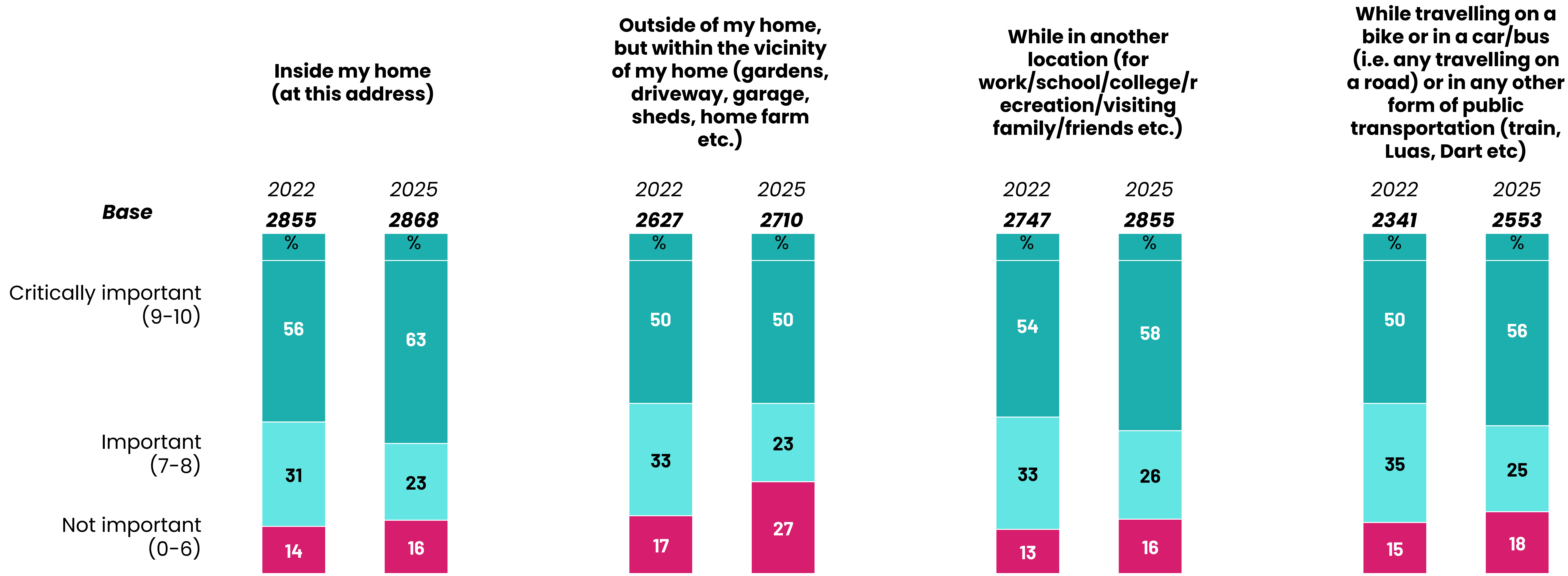
Younger cohorts, Dublin dwellers, and those paying higher monthly costs on their mobile service all note higher rates of daily usage across most locations.

DAILY USE	Total	Age					Region				Area		Unlimited Data			Cost					
		18-24	25-34	35-49	50-64	65+	Dublin	Rest of Leinster	Munster	Conn / Ulster	Urban	Rural	Yes	No	I don't know	From €1 < 15	From €15 < 20	From €20 < 30	From €30 < 45	€45 or more	Don't know
Base:	*2961*	*228*	*424*	*964*	*733*	*575*	*859*	*791*	*806*	*505*	*1981*	*980*	*2445*	*386*	*130*	*272*	*416*	*939*	*528*	*645*	*160*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Inside my home (at this address) (not including your usage via wifi)	76	85	78	77	76	66	81	77	65	83	78	72	78	70	56	75	74	74	79	78	75
While in another location that you regularly/frequently visit (for work/school/college/recreation/visiting family/friends etc.)	54	72	62	57	49	31	62	55	45	51	58	46	57	44	25	51	50	52	54	58	58
Outside of my home, but within the vicinity of my home (gardens, driveway, garage, sheds, home farm etc.)(not including your usage via wifi)	49	61	52	52	47	34	52	52	44	46	51	45	52	41	23	43	46	47	49	55	50
While travelling on a bike or in a car/bus or on any public transport	43	63	49	45	40	24	50	45	38	38	48	35	46	38	15	40	43	41	44	48	47

Q.16 Thinking back on the past week, how often in the following locations, did you typically use your mobile :
Base: All have mobile: 2961

Importance of mobile phone service when at various location

Although there is a slightly greater importance placed on service in the home, there is strong importance placed in all areas with at least half of the population assigning critical importance to access.



2025 Mean	8.43		7.67		8.29		8.12
2022 Mean	8.4		8.15		8.34		8.17
2019 Mean	8.49		8.4		8.63		8.59

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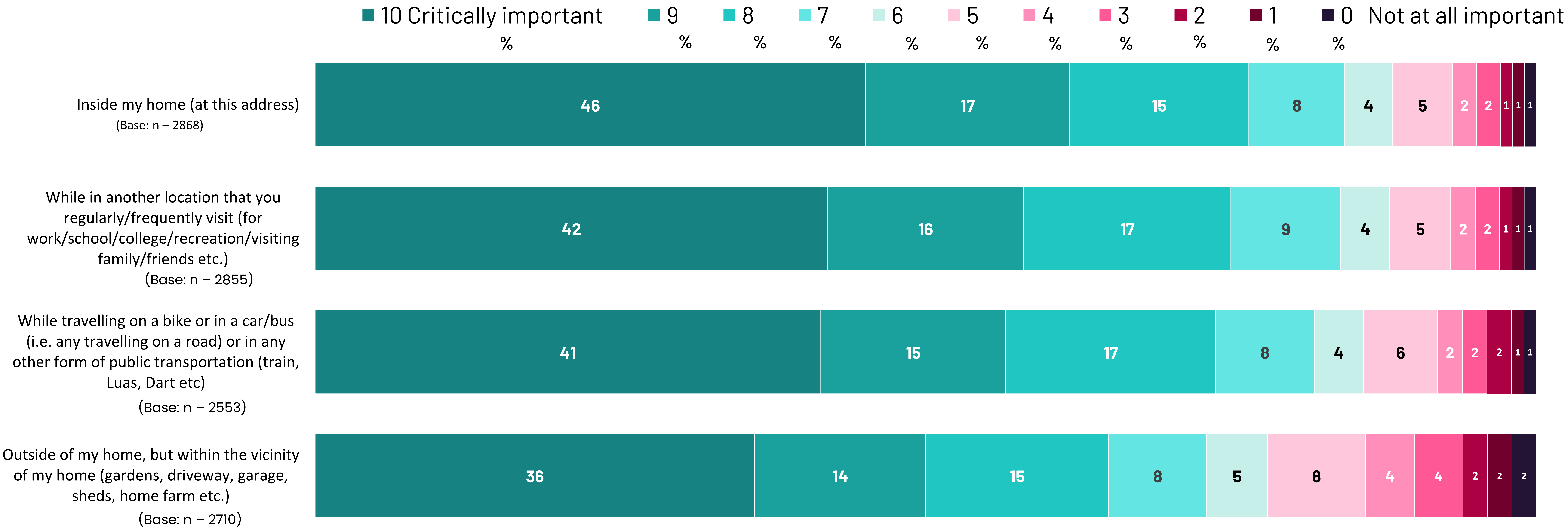
Q17 Thinking about your everyday use of your mobile phone, on a scale of 0 to 10, where 10 is critically important, and 0 is not at all important, how important is your mobile phone service to you in general, when you are in the following places, or engaged in the following activities?
Base: All mobile service used in location during past week

***** Note question wording change***

Importance of phone service in different locations

Unsurprisingly, given the higher reported usage within the home, having use of mobile phone services in the home is seen as most important. However, access to mobile services generally are deemed critically important by a substantial proportion of the population, with a minimum of half the sample giving a 9-10 score for each location.



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Q17 Thinking about your everyday use of your mobile phone, on a scale of 0 to 10, where 10 is critically important, and 0 is not at all important, how important is your mobile phone service to you in general, when you are in the following places, or engaged in the following activities?
Base: Base sizes vary

Importance of your mobile phone usage in locations x demographics

Assigned importance is relatively consistent across demographics.

9-10 Score	Total	Age					Mobile Features Used -				Unlimited Data		Experienced Loss of Signal - Mobile		
		18-24	25-34	35-49	50-64	65+	Voice	Texting	3G/4G or LTE Data	5G Data	Yes	No	Yes	No	DK
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Inside my home (at this address)	63	60	64	61	67	59	62	63	63	63	64	56	64	62	41
While in another location that you regularly/frequently visit (for work/school/college/recreation/visiting family/friends etc.)	58	60	61	60	58	50	58	58	60	60	59	53	61	57	52
While travelling on a bike or in a car/bus (i.e. any travelling on a road) or in any other form of public transportation (train, Luas, Dart etc)	56	60	56	56	59	47	55	56	57	57	56	53	55	57	36
Outside of my home, but within the vicinity of my home (gardens, driveway, garage, sheds, home farm etc.)	50	48	49	51	52	48	50	51	51	51	51	45	53	50	34

Q.17 Thinking about your everyday use of your mobile phone, on a scale of 0 to 10, where 10 is critically important, and 0 is not at all important, how important is your mobile phone service to you in general, when you are in the following places, or engaged in the following activities?
Base: Base sizes vary

Usage frequency of various mobile phone services

Making/Receiving traditional calls, instant messaging, browsing websites and use of Social media are most cited. A sizeable minority are using generative AI, with 30% using at least monthly.

Daily Usage	73	71	71	69	59	57	47	40	29	28	25	25	18	14	10	10	2
Weekly Usage	92	85	87	81	82	79	72	60	53	71	41	43	26	25	17	18	4
Monthly usage	96	89	91	85	89	84	81	66	66	81	48	49	29	30	21	21	7

Q.14 Thinking about your typical usage of your mobile phone, how often do you use the following services using your mobile data, not using Wi-Fi
Base: All have mobile: 2961

Usage frequency of various mobile phone services x demographics

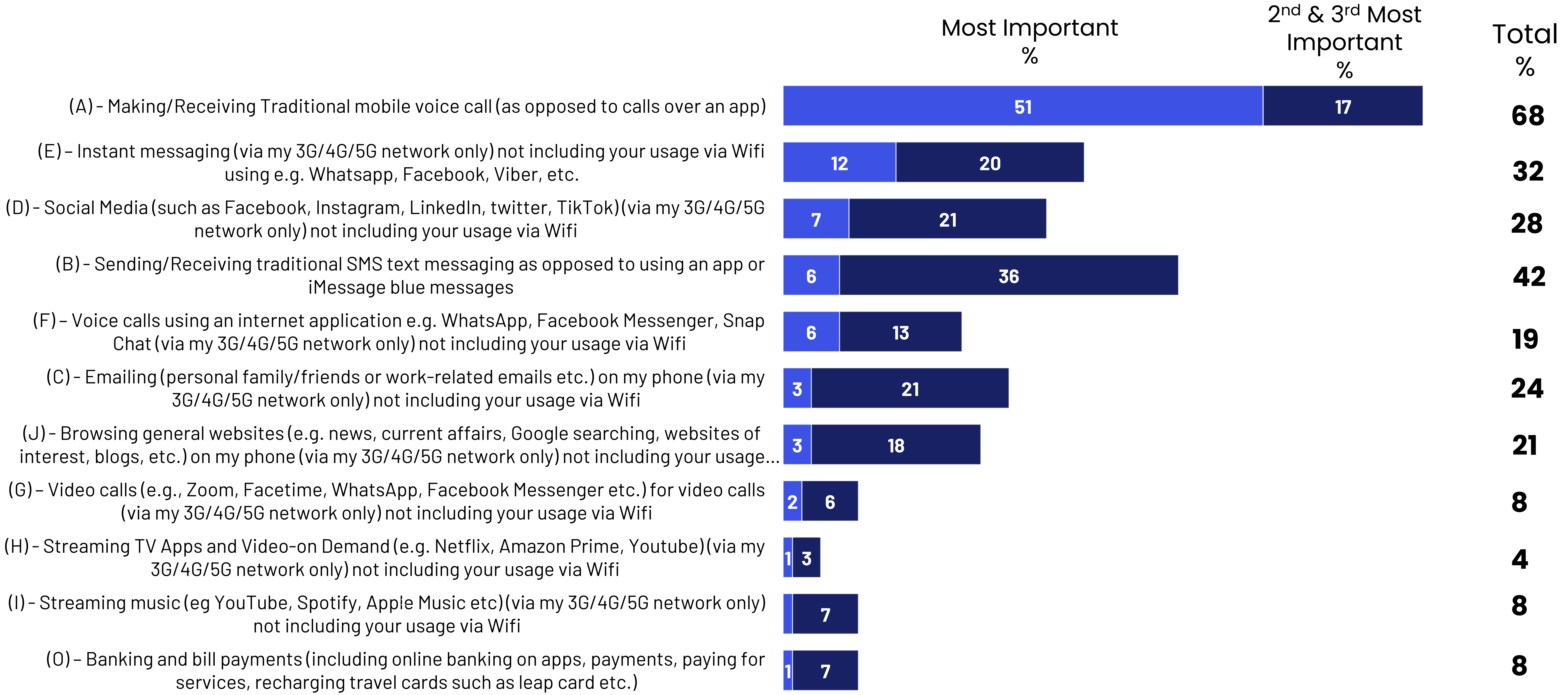
Younger, Dublin-based, middle class cohorts are more likely to use most services on a daily basis, with the exception of traditional calls and SMS messaging.

Everyday Usage	Total	Age					Region					Area		Class		
		18-24	25-34	35-49	50-64	65+	Dublin	Outside Dublin	Rest of Leinster	Munster	Conn / Ulster	Urban	Rural	ABC1	C2DE	F
Base:	2761	228	424	964	733	575	859	2102	791	806	505	1981	980	1578	1330	53
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
(A) - Making/Receiving Traditional mobile voice call (as opposed to calls over an app)	73	66	69	74	76	77	70	74	78	71	75	72	76	71	73	90
(J) - Browsing general websites (e.g. news, current affairs, Google searching, websites of interest, blogs, etc.) on my phone (via my 3G/4G/5G network only) not including your usage via Wifi	71	83	82	74	66	51	82	66	72	62	62	77	60	77	65	62
(E) – Instant messaging (via my 3G/4G/5G network only) not including your usage via Wifi using e.g. Whatsapp, Facebook, Viber, etc.	71	81	84	75	66	49	79	68	76	59	69	76	63	77	68	55
(D) - Social Media (such as Facebook, Instagram, LinkedIn, twitter, TikTok) (via my 3G/4G/5G network only) not including your usage via Wifi	69	89	84	71	60	41	74	67	73	60	66	72	63	73	66	56
(B) - Sending/Receiving traditional SMS text messaging as opposed to using an app or iMessage blue messages	59	61	56	57	65	57	62	58	62	56	54	60	58	60	57	66
(F) – Voice calls using an internet application e.g. WhatsApp, Facebook Messenger, Snap Chat (via my 3G/4G/5G network only) not including your usage via Wifi	57	67	71	59	49	40	68	52	62	48	43	62	49	61	55	34
(C) - Emailing (personal family/friends or work-related emails etc.) on my phone (via my 3G/4G/5G network only) not including your usage via Wifi	47	49	59	55	41	26	57	43	54	38	33	52	38	59	37	22
(I) - Streaming music (eg YouTube, Spotify, Apple Music etc) (via my 3G/4G/5G network only) not including your usage via Wifi	40	71	57	42	27	9	49	37	43	35	29	46	31	47	36	15
(G) – Video calls (e.g., Zoom, Facetime, WhatsApp, Facebook Messenger etc.) for video calls (via my 3G/4G/5G network only) not including your usage via Wifi	29	36	44	32	22	12	41	24	31	21	17	34	21	35	24	18
(O) – Banking and bill payments (including online banking on apps, payments, paying for services, recharging travel cards such as leap card etc.)	28	37	36	34	21	16	36	25	29	23	21	32	22	36	22	15
(M) - Sending Voice Notes	25	48	39	23	12	7	35	20	29	13	17	28	19	28	22	14
(H) - Streaming TV Apps and Video-on Demand (e.g. Netflix, Amazon Prime, Youtube) (via my 3G/4G/5G network only) not including your usage via Wifi	25	38	37	26	16	7	30	22	28	20	15	27	21	27	24	6
(K) - Any other "smart" home devices (that give you control wirelessly via your mobile phone), which assists with the Accessibility of your home such as smart light bulbs (e.g. Philips Hue), smart kettle, smart power switch, smart washing machine, smart home security etc.	18	22	22	21	14	7	25	15	21	11	10	20	13	24	12	8
(P) - Generative AI services for personal use (e.g. ChatGPT, Claude, etc.)	14	25	20	15	6	4	19	11	14	10	7	16	9	17	9	18
(L) – Playing online video games (e.g. Call of Duty Mobile, PUBG Mobile, FIFA Mobile, Wild Rift) on my phone (via my 3G/4G/5G network only) not including your usage via Wifi	10	21	12	11	5	4	12	10	12	7	11	11	9	10	11	3
(Q) - Generative AI services for work purposes (e.g. ChatGPT, Claude, etc.)	10	15	16	13	5	1	14	9	10	10	5	12	6	14	7	8
(N) - Gambling Apps (Bet365, TonyBet etc.)	2	3	2	2	2	1	2	2	2	2	1	2	2	2	2	3

Q.14 Thinking about your typical usage of your mobile phone, how often do you use the following services using your mobile data, not using Wi-Fi
Base: All have mobile: 2961

Identifying the essential mobile services

We see that in most cases, the services that have high rates of everyday usage, are also deemed most vital by customers, with clear alignment between usage and importance – calling and messaging are most important. General browsing shows some misalignment with more noting everyday usage, than citing it as essential.



Q.15 Thinking about the things you typically use your mobile phone for, which would you describe as "must haves" or are the most important to you? Please rank your top three most important mobile phone services.
Base: All have mobile: 2,961

Essential mobile services x demographics

Older cohorts are more likely to view traditional calling and texting as more important, while social media and instant messaging apps are more essential among younger cohorts. Divisions by age highlight the need for bandwidth for all elements of mobile services.

3 Most Important Services (total number of mentions)	Total	Age					Mobile Features Used -				Unlimited Data			Experienced Loss of Signal - Mobile		
		18-24	25-34	35-49	50-64	65+	Voice	Texting	3G/4G or LTE Data	5G Data	Yes	No	DK	Yes	No	DK
Base:	2961	228	424	964	733	575	2825	2670	2313	1785	2445	386	130	923	1970	68
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
(A) - Making/Receiving Traditional mobile voice call (as opposed to calls over an app)	68	50	56	65	75	88	70	69	66	66	67	70	75	67	69	64
(B) - Sending/Receiving traditional SMS text messaging as opposed to using an app or iMessage blue messages	42	33	29	35	48	66	43	45	40	39	41	47	55	40	44	43
(E) - Instant messaging (via my 3G/4G/5G network only) not including your usage via Wifi using e.g. Whatsapp, Facebook, Viber, etc.	32	29	41	36	30	23	32	32	36	35	34	29	18	37	30	24
(D) - Social Media (such as Facebook, Instagram, LinkedIn, twitter, TikTok) (via my 3G/4G/5G network only) not including your usage via Wifi	28	55	37	27	19	10	28	28	30	31	30	21	15	32	26	20
(C) - Emailing (personal family/friends or work-related emails etc.) on my phone (via my 3G/4G/5G network only) not including your usage via Wifi	24	17	28	28	27	15	23	24	25	28	25	16	13	25	23	25
(J) - Browsing general websites (e.g. news, current affairs, Google searching, websites of interest, blogs, etc.) on my phone (via my 3G/4G/5G network only) not including your usage via Wifi	21	17	21	25	23	13	20	20	22	24	22	17	10	22	20	6
(F) - Voice calls using an internet application e.g. WhatsApp, Facebook Messenger, Snap Chat (via my 3G/4G/5G network only) not including your usage via Wifi	19	18	23	20	18	13	18	18	20	19	19	17	13	22	17	10
(G) - Video calls (e.g., Zoom, Facetime, WhatsApp, Facebook Messenger etc.) for video calls (via my 3G/4G/5G network only) not including your usage via Wifi	8	12	13	6	8	5	8	8	9	9	9	6	1	8	9	13
(I) - Streaming music (eg YouTube, Spotify, Apple Music etc) (via my 3G/4G/5G network only) not including your usage via Wifi	8	15	11	7	5	3	8	8	8	9	8	7	3	10	6	13
(O) - Banking and bill payments (including online banking on apps, payments, paying for services, recharging travel cards such as leap card etc.)	8	3	6	10	9	7	7	7	9	8	8	8	7	11	6	5
(H) - Streaming TV Apps and Video-on Demand (e.g. Netflix, Amazon Prime, Youtube) (via my 3G/4G/5G network only) not including your usage via Wifi	4	7	7	5	2	1	4	4	5	5	5	4	1	5	4	3

Q.15 Thinking about the things you typically use your mobile phone for, which would you describe as "must haves" or are the most important to you? Please rank your top three most important mobile phone services.
Base: All have mobile: 2,961

All answers 1% or less not shown

Usage of your mobile phone in a typical day x daily usage

Those using internet-based services (e.g instant messaging, social media, etc) are less likely to assign importance to traditional calls and texts, however these are vital services for those using these traditional services on a daily basis.

3 Most Important Services (total number of mentions)	Total	Use daily using mobile data																
		(A) - Making/Receiving Traditional mobile voice calls	(B) - Sending/Receiving traditional SMS text messages	(C) - Emailing	(D) - Social Media	(E) - Instant messaging	(F) - Voice calls using an internet application	(G) - Video calls	(H) - Streaming TV Apps and Video-on Demand	(I) - Streaming music	(J) - Browsing general websites	(K) - Any other "smart" home devices	(L) - Playing online video games	(M) - Sending Voice Notes	(N) - Gambling Apps	(O) - Banking and bill payments	(P) - Generative AI services for personal use	(Q) - Generative AI services for work purposes
UNWTD	2961	2167	1746	1317	1856	1946	1551	798	659	1058	1927	503	271	631	50	793	338	274
(A) - Making/Receiving Traditional mobile voice call (as opposed to calls over an app)	68	77	76	68	66	67	66	66	60	60	67	65	57	59	70	67	53	54
(B) - Sending/Receiving traditional SMS text messaging as opposed to using an app or iMessage blue messages	42	49	55	38	37	38	38	36	35	31	39	36	36	36	40	34	24	27
(E) – Instant messaging (via my 3G/4G/5G network only) not including your usage via Wifi using e.g. Whatsapp, Facebook, Viber, etc.	32	29	26	35	37	40	35	33	32	36	37	29	24	33	6	35	33	31
(D) - Social Media (such as Facebook, Instagram, LinkedIn, twitter, TikTok) (via my 3G/4G/5G network only) not including your usage via Wifi	28	27	28	29	39	34	35	35	37	38	34	33	41	41	35	32	39	40
(C) - Emailing (personal family/friends or work-related emails etc.) on my phone (via my 3G/4G/5G network only) not including your usage via Wifi	24	24	27	41	27	28	30	34	30	30	28	34	28	28	43	34	30	35
(J) - Browsing general websites (e.g. news, current affairs, Google searching, websites of interest, blogs, etc.) on my phone (via my 3G/4G/5G network only) not including your usage via Wifi	21	19	18	23	23	23	21	20	21	24	26	23	18	22	4	26	27	25
(F) – Voice calls using an internet application e.g. WhatsApp, Facebook Messenger, Snap Chat (via my 3G/4G/5G network only) not including your usage via Wifi	19	17	17	17	20	21	24	22	19	22	20	18	20	23	16	20	17	14
(G) – Video calls (e.g., Zoom, Facetime, WhatsApp, Facebook Messenger etc.) for video calls (via my 3G/4G/5G network only) not including your usage via Wifi	8	8	8	9	10	9	10	13	11	10	9	11	12	12	8	10	14	13
(I) - Streaming music (eg YouTube, Spotify, Apple Music etc) (via my 3G/4G/5G network only) not including your usage via Wifi	8	6	7	9	9	9	8	9	14	16	9	10	11	11	3	9	13	11
(O) – Banking and bill payments (including online banking on apps, payments, paying for services, recharging travel cards such as leap card etc.)	8	7	7	8	7	7	8	7	6	7	8	10	5	6	2	12	9	8
(H) - Streaming TV Apps and Video-on Demand (e.g. Netflix, Amazon Prime, Youtube) (via my 3G/4G/5G network only) not including your usage via Wifi	4	4	4	5	6	6	5	5	12	8	6	7	8	7	9	5	7	6

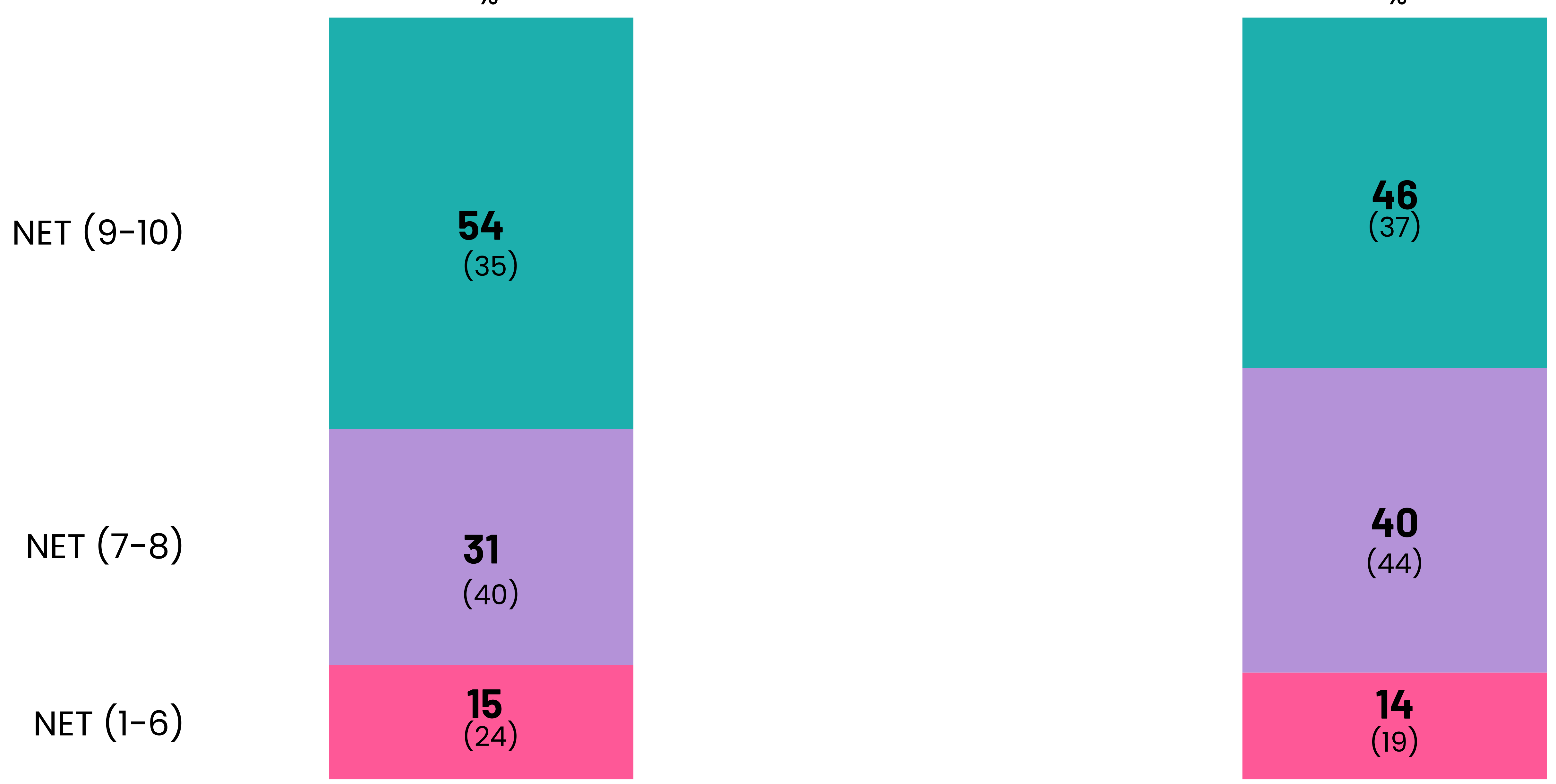
Q.15 Thinking about the things you typically use your mobile phone for, which would you describe as "must haves" or are the most important to you? Please rank your top three most important mobile phone services.
Base: All have mobile: 2961

Satisfaction with mobile phone coverage

Encouragingly, satisfaction has increased substantially since 2022, following a pattern of stagnation or decline. This is seen both within the home and further afield.

Satisfaction with your mobile phone network's coverage where you live (i.e. at home)

Satisfaction with your mobile phone network's coverage in other areas you visit/travel to



	At home		Other areas
Mean 2025	**8.14** ⇧	**Mean 2025**	**8.06** ⇧
Mean 2022	7.45	Mean 2022	7.66
Mean 2019	7.55	Mean 2019	7.66
Mean 2017	7.60	Mean 2017	7.92

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Q.18 How satisfied are your with your mobile phone network's coverage where you live (i.e. at home)?
Q.19 How satisfied are your with your mobile phone network's coverage in other areas you visit/travel to?
Base: All have mobile : 2961

Satisfaction with Mobile phone coverage x demographics

9-10 satisfaction score	Total	Gender		Age					Social Class		Region			
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1 F1	C2DE F2	Dublin	Rest of Leinster	Munster	Connaught/Ulster
UNWTD	***2961***	***1394***	***1566***	***228***	***424***	***964***	***733***	***575***	***1619***	***1342***	***859***	***791***	***806***	***505***
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Satisfied with your mobile phone network's coverage where you live (i.e. at home)	54	53	56	52	54	54	54	57	56	52	62	56	49	46
Satisfied with your mobile phone network's coverage in other areas you visit/travel to	46	44	47	44	42	45	46	50	44	47	54	43	44	38

Q.18 How satisfied are your with your mobile phone network's coverage where you live (i.e. at home)?
Q.19 How satisfied are your with your mobile phone network's coverage in other areas you visit/travel to?
Base: All have mobile : 2961

HOW DO CONSUMERS PLACE CALLS?

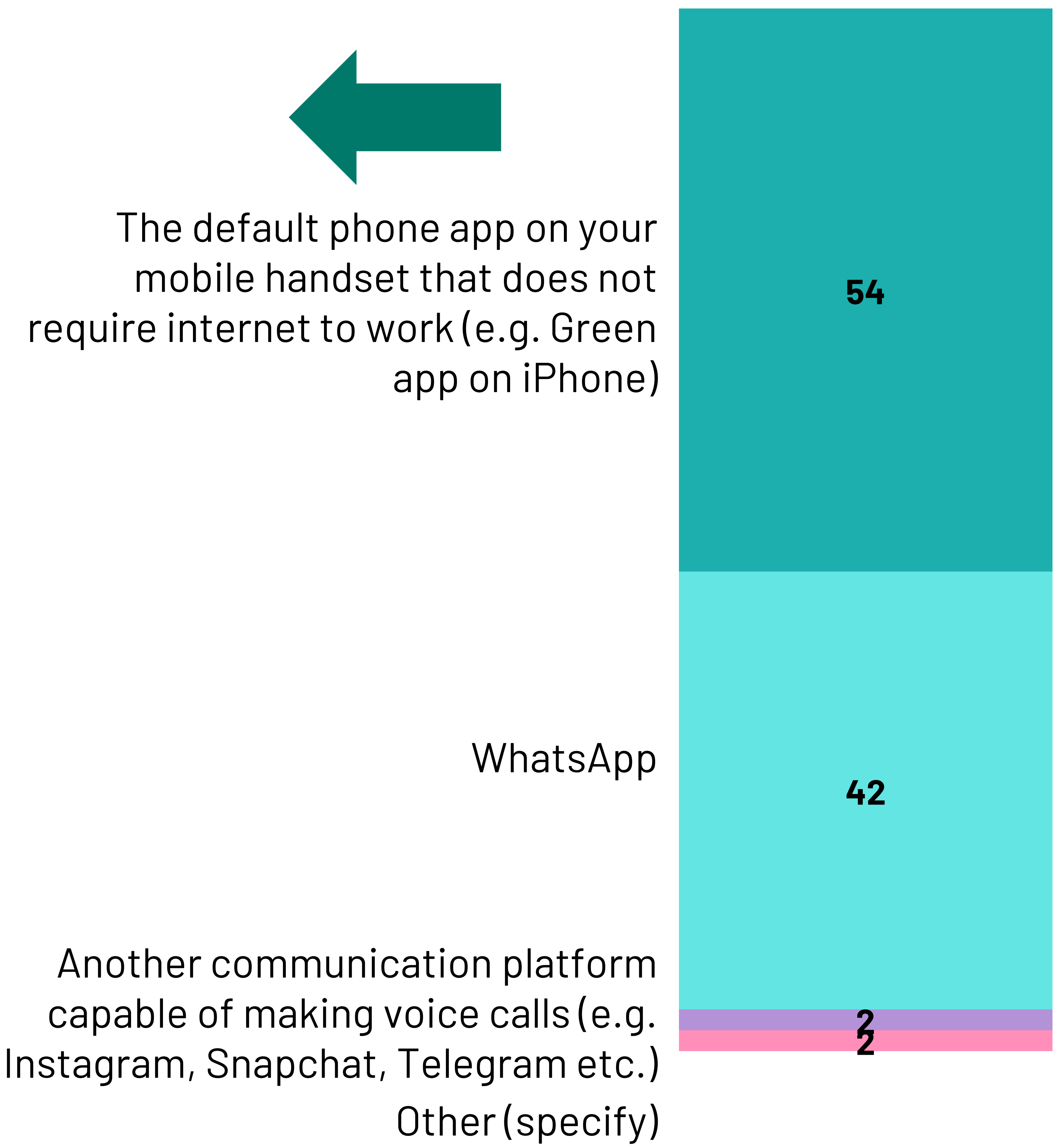
Usual approach used to make a mobile voice call

There is a split in usership of default phone apps and WhatsApp, with younger, more urban / Dublin based consumers more likely to use WhatsApp, as well as those who view internet-based mobile services as most essential.

Default phone app

		%
Age	18-24	49
	25-34	42
	35-49	54
	50-64	56
	65+	64
Region	Dublin	39
	Rest of Leinster	60
	Munster	57
	Connaught/Ulster	62
Unlimited Data	Yes	52
	No	57
	I don't know	69
Essentials (Most)	(A) - Calls	64
	(B) - SMS	42
	(C) - Emailing	34
	(D) - Social Media	44
	(E) – Instant messaging	38
	(F) – Voice call Apps	29
	(G) – Video calls	40
	(H) - Streaming TV	50
	(I) - Streaming music	28
	(J) - Browsing websites	59
	(K) - Other "smart" home devices	100
	(L) – Playing online video games	20
	(M) - Sending Voice Notes	66
	(N) - Gambling Apps	-
	(O) – Banking and bill payments	52
	(P) - Generative AI - Personal use	-
	(Q) - Generative AI work use	-

Total
%



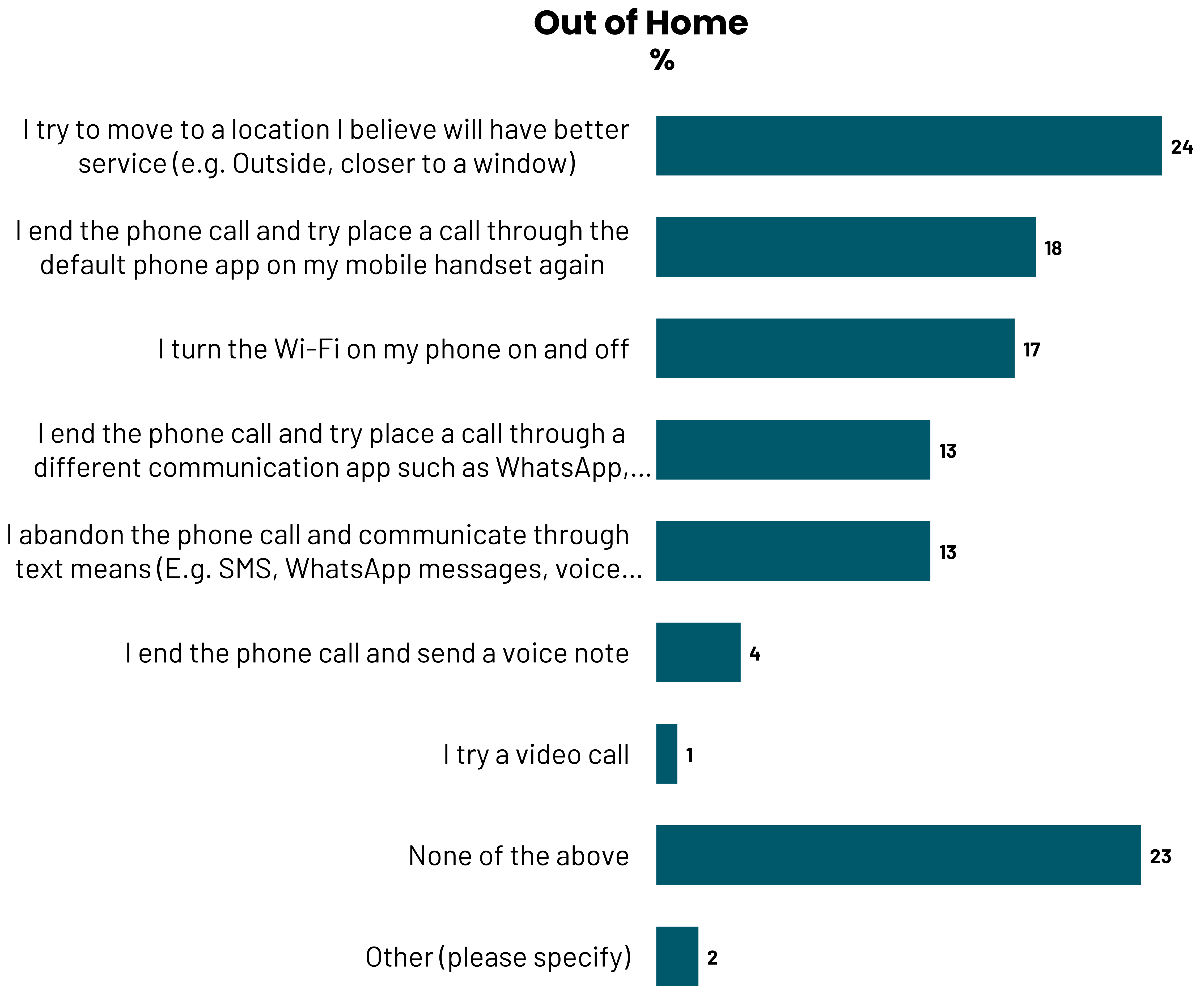
WhatsApp

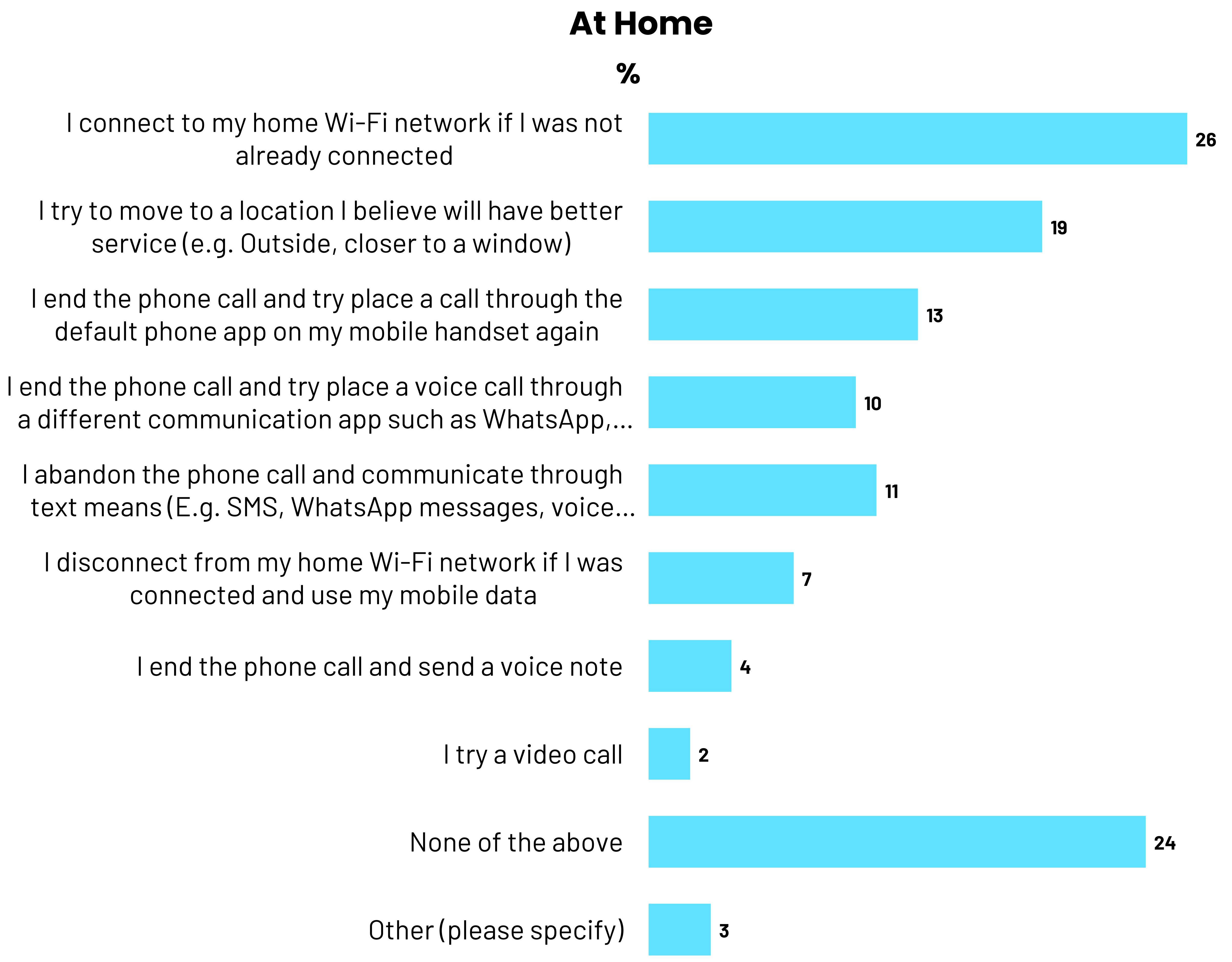
		%
Age	18-24	43
	25-34	55
	35-49	43
	50-64	41
	65+	31
Region	Dublin	57
	Rest of Leinster	34
	Munster	38
	Connaught/Ulster	33
Unlimited Data	Yes	43
	No	40
	I don't know	22
Essentials (Most)	(A) - Calls	32
	(B) - SMS	56
	(C) - Emailing	57
	(D) - Social Media	45
	(E) – Instant messaging	57
	(F) – Voice call Apps	69
	(G) – Video calls	48
	(H) - Streaming TV	38
	(I) - Streaming music	66
	(J) - Browsing websites	39
	(K) - Other "smart" home devices	-
	(L) – Playing online video games	80
	(M) - Sending Voice Notes	34
	(N) - Gambling Apps	-
	(O) – Banking and bill payments	48
	(P) - Generative AI - Personal use	100
	(Q) - Generative AI work use	49

 Q34 When you place a mobile voice phone call, do you typically use:
Base: All have mobile: 2961

Steps taken to fix voice call connectivity problems out of home / at home

There is less reliance on alternative apps when focusing on those making default phone calls, and more focus on relocation and Wi-Fi access. Interestingly, almost 1 in 5 turn their Wi-Fi on and off while experiencing a non-internet connectivity issue out of home.

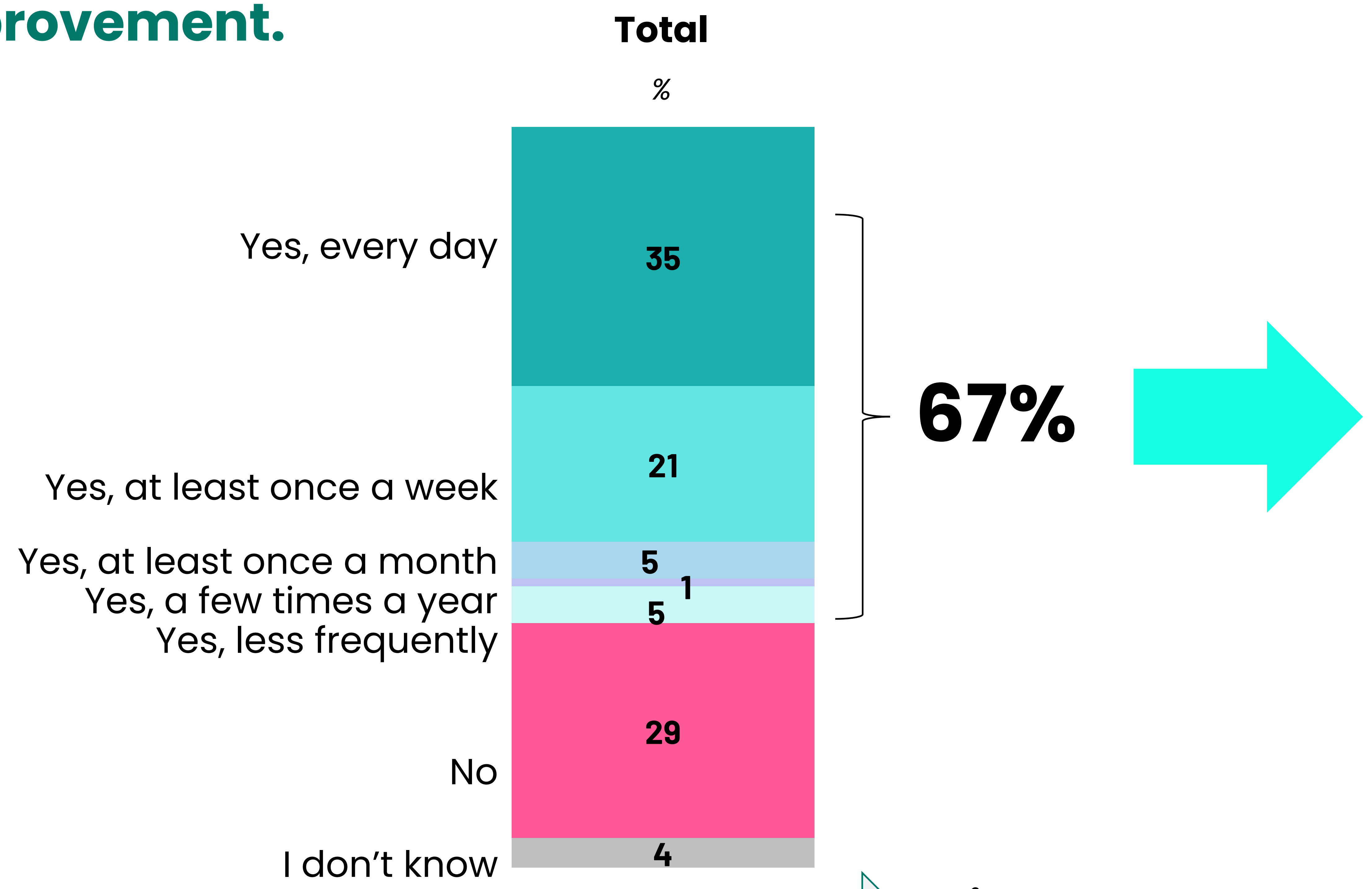




Q36 When you are out of home placing a voice call through your default phone app and connectivity is poor, which of the following steps would you take to fix this issue?
Q37 When you are at home placing a voice call through your default phone app and connectivity is poor, which of the following steps would you take to fix this issue?
Base: All using default phone app to make calls 1596

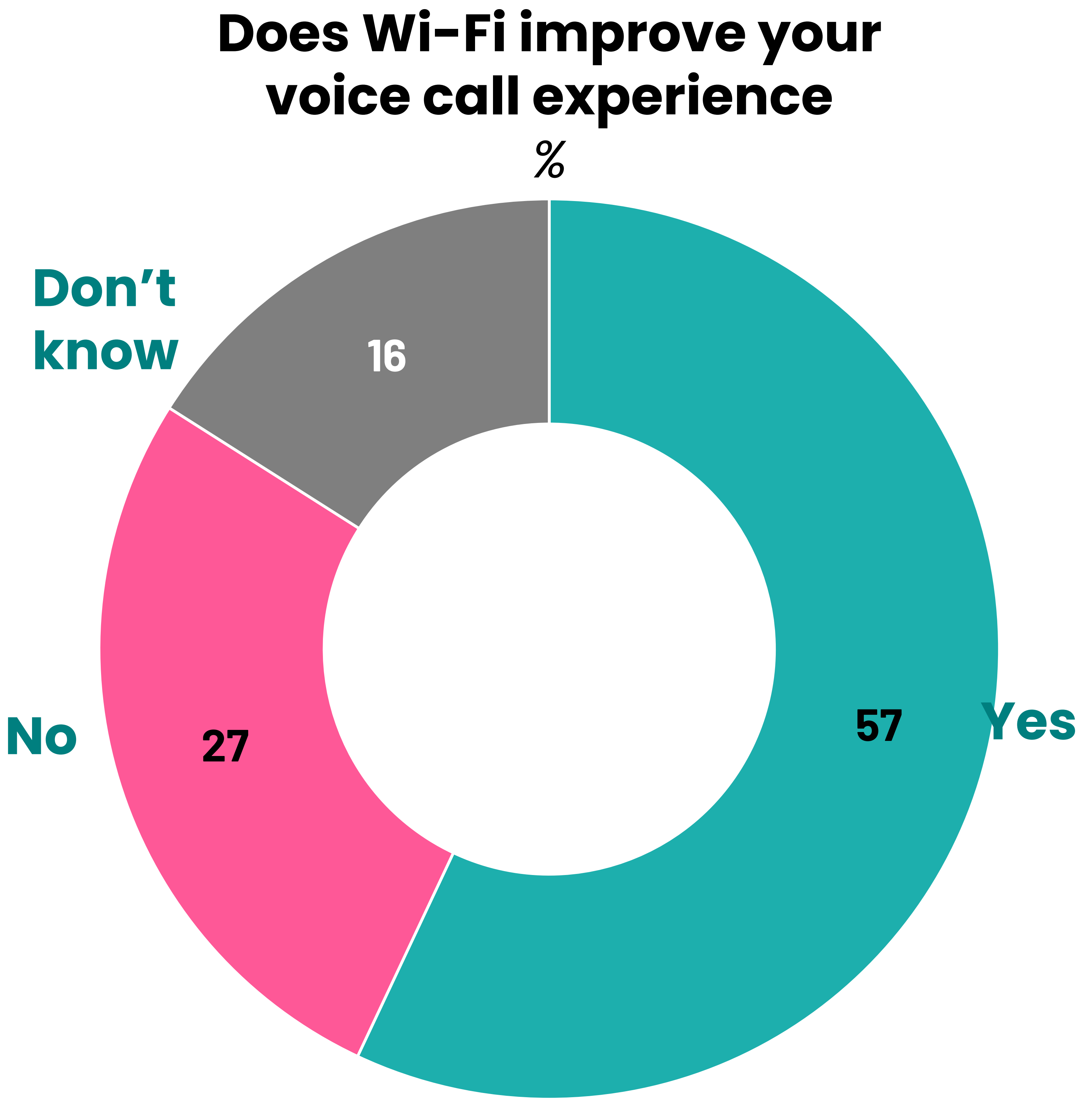
Incidence of ever making calls over Wi-Fi and impact of Wi-Fi on voice call experience

Following a significant increase in 2022, this has remained stable in 2025 with 2 in 3 noting use of Wi-Fi. Those in Dublin, like in previous waves are more likely to use Wi-Fi, indicative of more extensive usage where strong broadband connections are most accessible. Among those using Wi-Fi, a sizeable minority do not cite an improvement.



2025 ANY YES	**67%**
2022 ANY YES	69%
2019 ANY YES	46%
2019 % at least weekly	35%

Higher among:
Dublin – 72%
Under 35s – 79%



( ) = 2022

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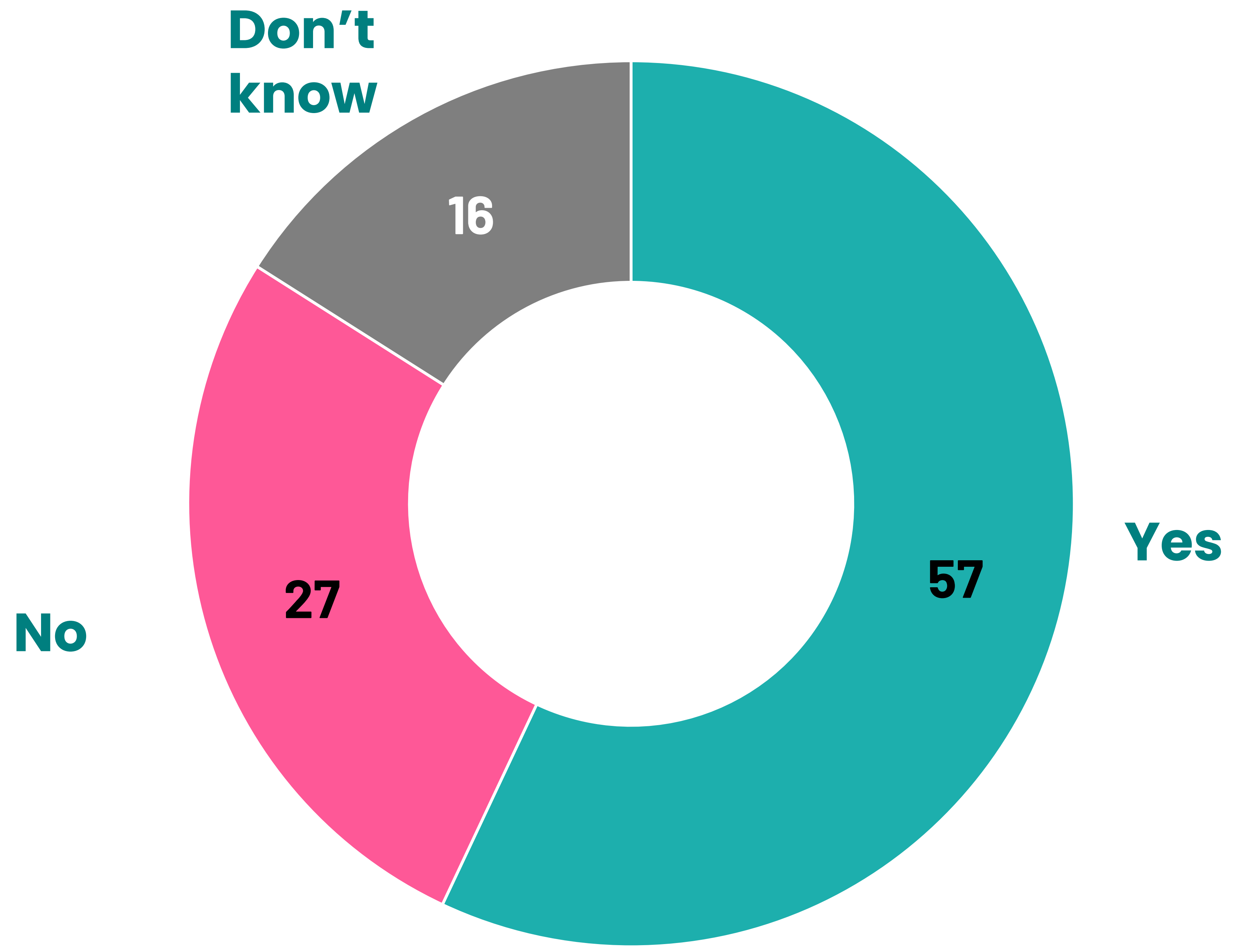
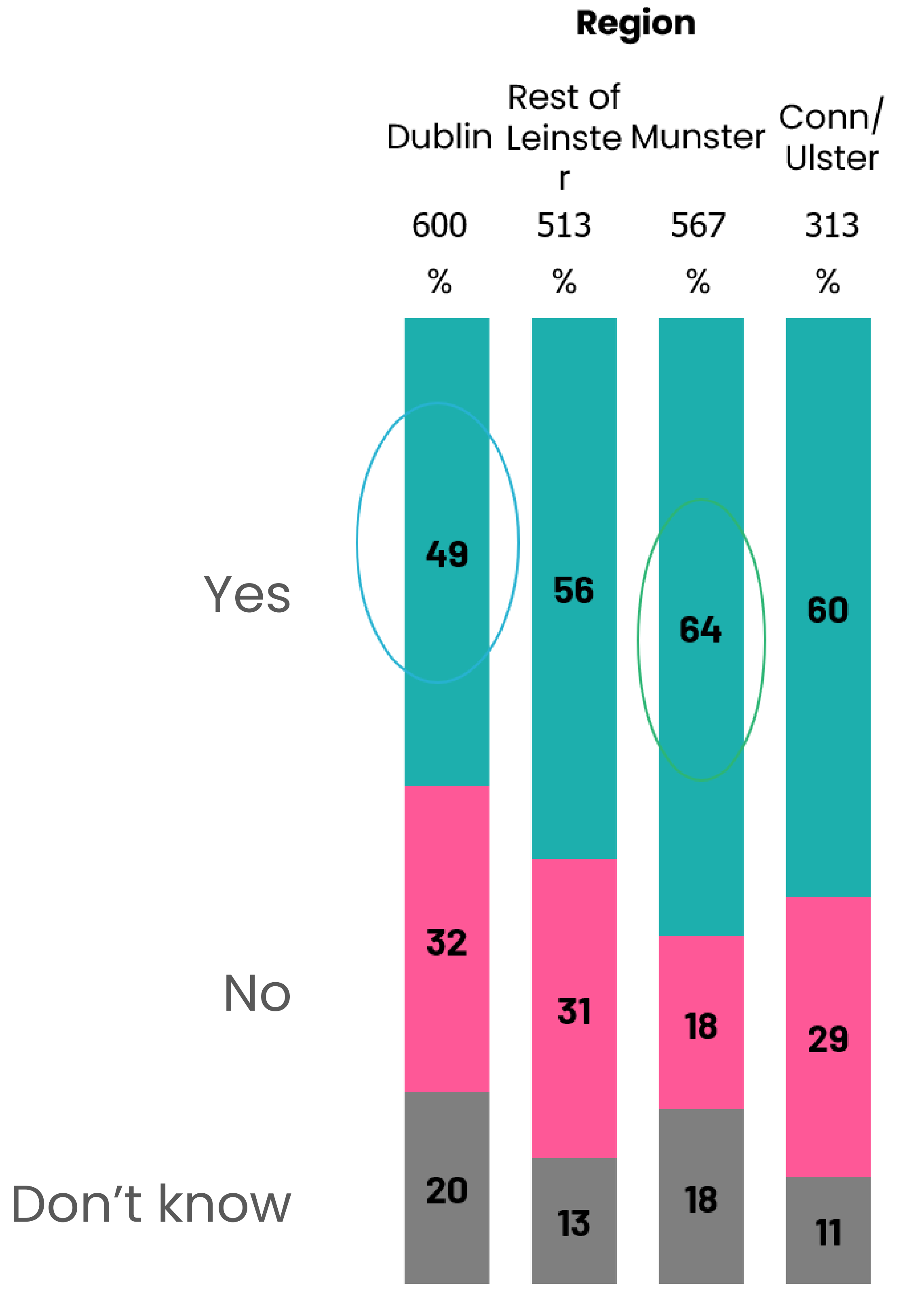
Q.22 Do you ever make calls over Wi-Fi?*
Q23 Does making calls over Wi-Fi improve your voice call experience?*
Base: All who have mobile 2961/1993

**Question wording changed slightly in 2025*

Incidence of Wi-Fi improving voice call experience x samples

Over half note an improvement in call experience when using Wi-Fi. Interestingly, this is most evident outside of Dublin, illustrating that although there is higher usage this does not equate to improved quality.





2022					
	Yes	61	**51**	62	**67**
	No	39	49	38	33

(2022)

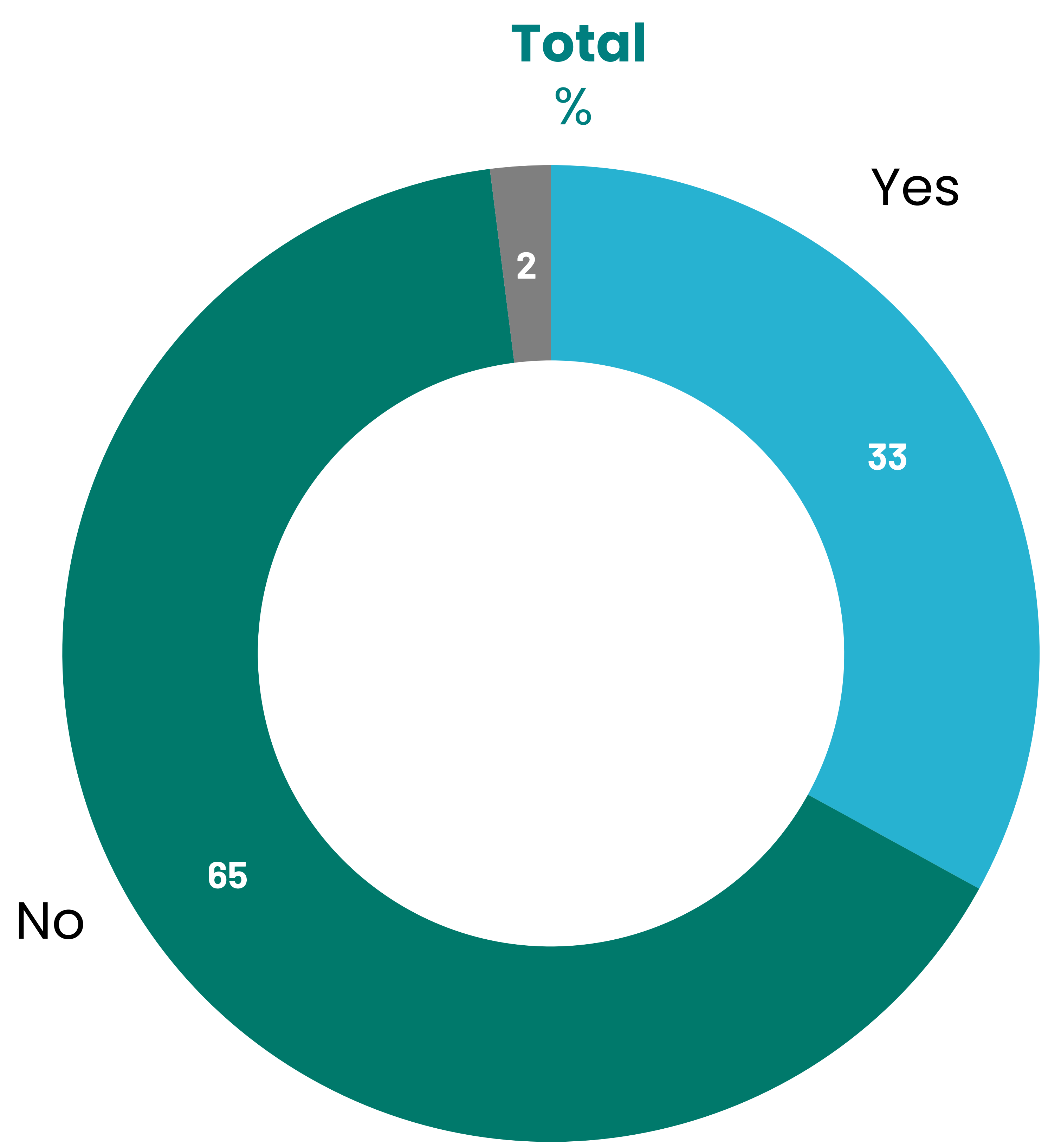
ComReg.ie Q23 Does making calls over Wi-Fi improve your voice call experience?
Base: All who make calls over Wi-Fi n=1993

**Question wording changed slightly in 2025*

COVERAGE ISSUES

Experienced a loss of signal (or no/poor coverage) in the past month

In the last month, 33% have experienced loss of signal when using mobile networks, with rural users citing higher incidences of disruptions.



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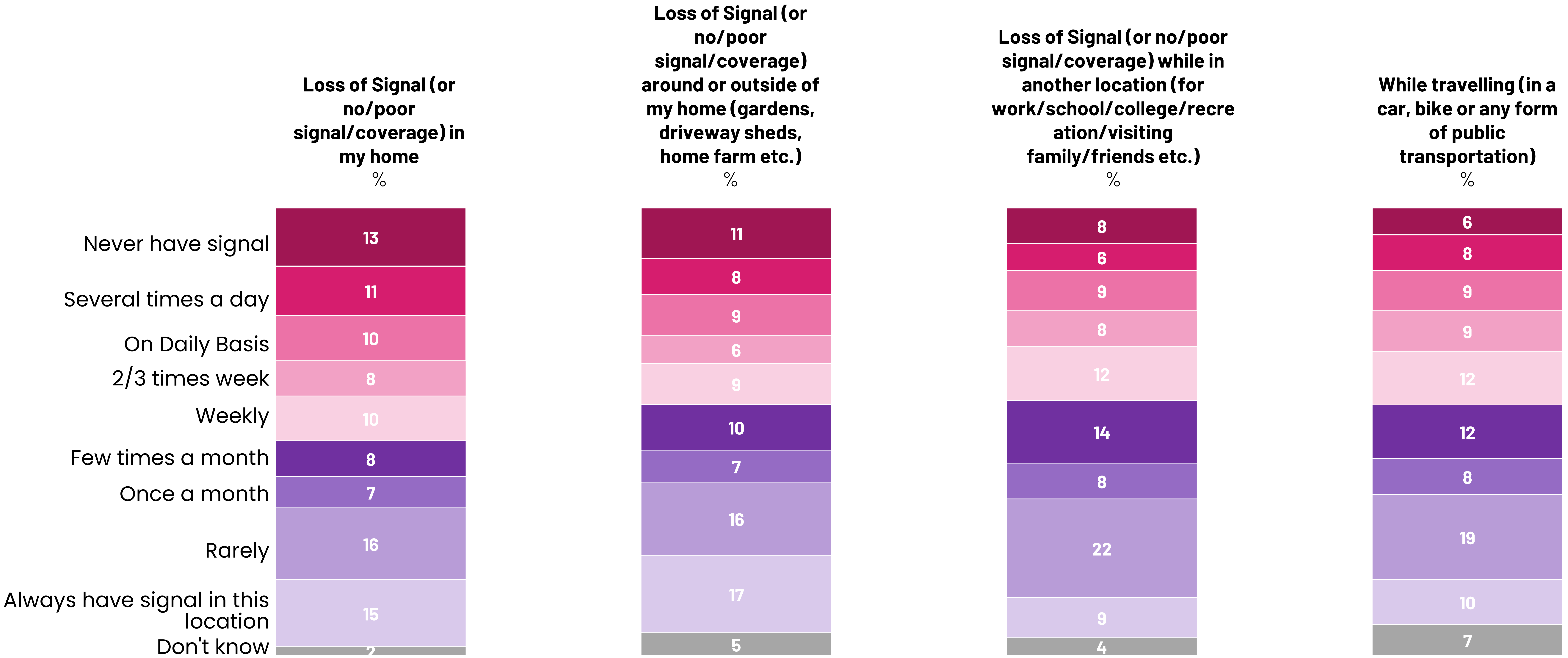
Q.20 Thinking about your mobile phone experience over the past month, have you experienced a loss of signal (or no/poor coverage)? **SINGLE**
Base: All mobile users – n = 2961

Frequency of experiencing service issues during past month at particular locations

Among those experiencing service issues, this is most frequently cited within their home and gardens with 1 in 3 citing outages in the home and 3 in 10 citing outages in the vicinity of the home on a daily basis. Just under 1 in 4 cite daily outages in other locations and while travelling.



Any (Daily Issues)	34	29	23	23

Q.20a How often did you experience a loss of signal in each of these locations?
Base: All experiencing loss of signal 923

Type of loss of signal in each of these locations

Call related issues are most cited, with higher occurrences within and surrounding the home being noted. Issues with mobile data are also more commonly cited within the home.

	Total %	Loss of Signal (or no/poor signal/coverage) in my home %	Loss of Signal (or no/poor signal/coverage) around or outside of my home (gardens, driveway sheds, home farm etc.) %	Loss of Signal (or no/poor signal/coverage) while in another location (for work/school/college/recreation/visiting family/friends etc.) %	While travelling (in a car, bike or any form of public transportation) %
Dropped call	45	49	50	49	52
Could not make a call	40	50	48	43	42
Poor data service (online videos buffering, websites loading slowly etc.)	40	44	42	42	43
Quality of reception deteriorated when on a call	37	40	38	36	38
Could not receive a call	35	47	44	42	40
Unable to use mobile data service (websites not loading, unable to stream/watch videos online, unable to use social media etc.)	35	42	41	40	34
Unable to send a text	23	28	26	27	27
Unable to receive a text	21	29	26	27	27
Other specify	2	1	1	1	2

Q20b You said that you experienced a loss of signal in the last month. What did you experience?
Base: All experiences of lost signal - 923

Type of loss of signal in the last month in each of these locations

Dropped calls and not being able to make a call continue to be the top issues experienced. Following a steady decline across previous waves, we are now seeing an increase once again in the rate of people unable to receive a text. Citing of dropped calls are continuing to increase.

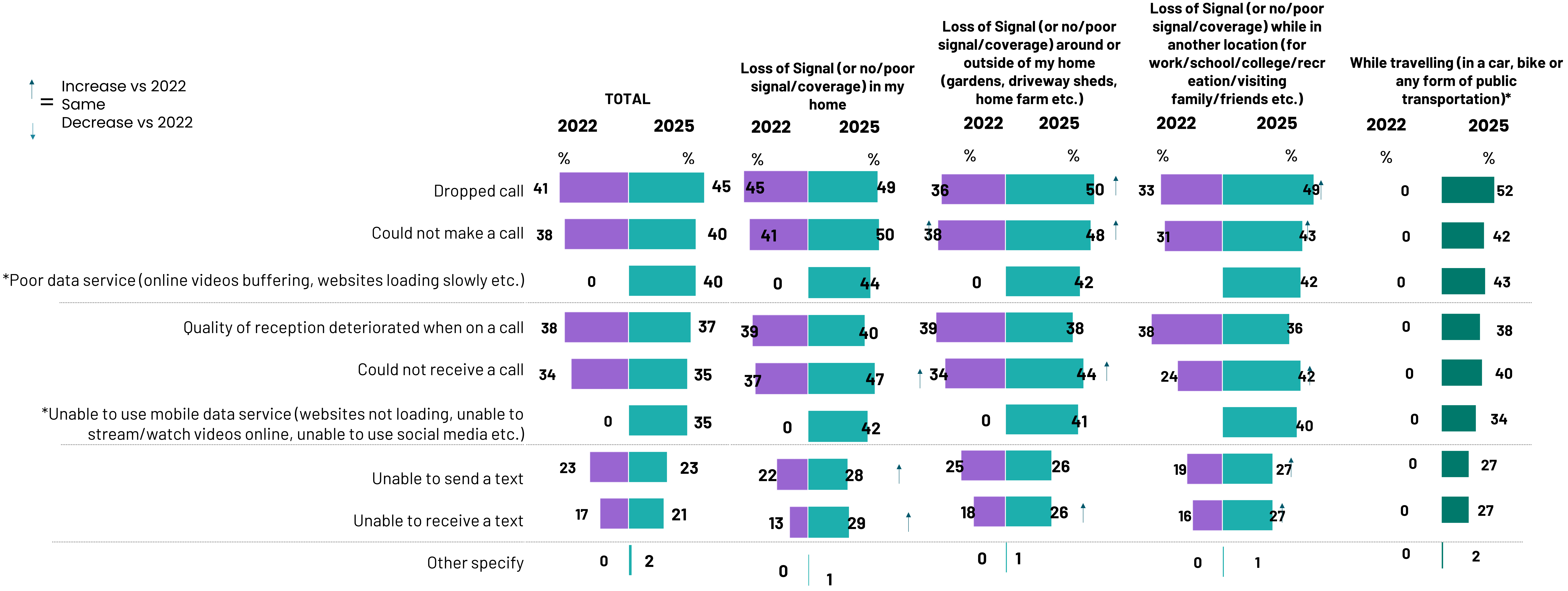
	Total %	2017 3126* %	2019 3554* %	2022 3374* %
Dropped call	45	32	37	41
Could not make a call	40	37	37	38
Poor data service (online videos buffering, websites loading slowly etc.)	40	-	-	-
Quality of reception deteriorated when on a call	37	50	38	38
Could not receive a call	35	31	29	34
Unable to use mobile data service (websites not loading, unable to stream/watch videos online, unable to use social media etc.)	35	-	-	-
Unable to send a text	23	19	19	23
Unable to receive a text	21	31	29	17
Other specify	2	1	2	0

Q20b You said that you experienced a loss of signal in the last month. What did you experience?
Base: All experiencing lost signal – 923

* Base size based on responses not respondents

Service issues experienced during past month 2025 vs 2022

Call issues and receiving texts have increased across all comparable areas.



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Q.20b You said that you experienced a loss of signal in the last month. What did you experience? – MULTI – RANDOMISE – SHOW SCREEN
Base: All experiences of lost signal – 923

*** Not asked in 2022**

Type of signal issue x demographics

Those in rural areas are more likely to cite issues relating to calls and texts, while those in Connacht / Ulster are more likely to cite all issues that are listed.

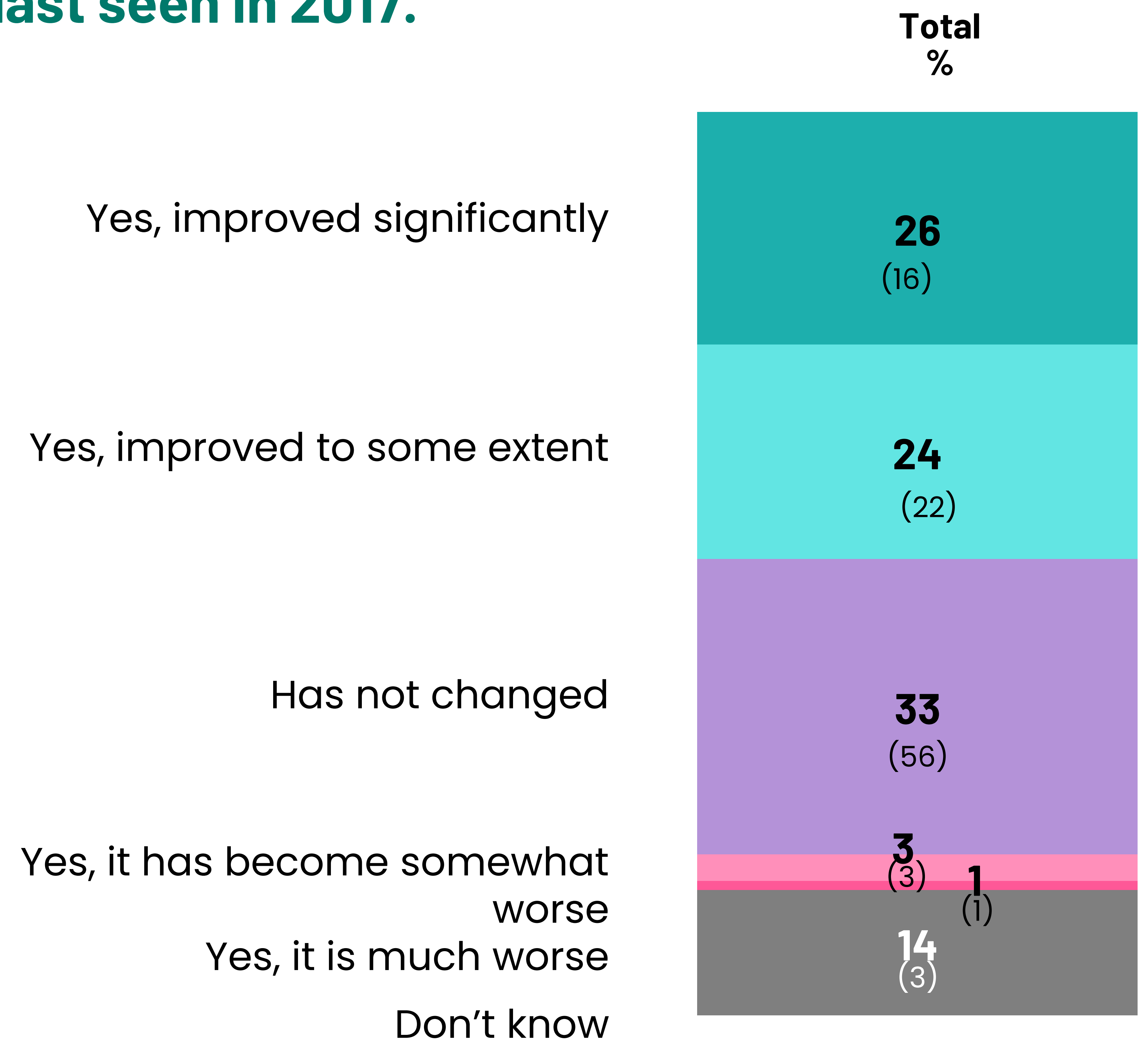
	Total	Gender		Age					Region				Area	
		Male	Female	18-24	25-34	35-49	50-64	65+	Dublin	Rest of Leinster	Munster	Connaught/Ulster	Urban	Rural
UNWTD	***923***	***435***	***488***	***87***	***156***	***318***	***216***	***131***	***226***	***266***	***205***	***226***	***544***	***379***
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Dropped call	45	45	44	30	38	49	51	52	31	46	43	58	35	56
Could not make a call	40	37	43	25	42	42	39	52	22	38	41	59	31	52
Poor data service (online videos buffering, websites loading slowly etc.)	40	40	40	50	51	43	29	24	38	36	35	50	40	40
Quality of reception deteriorated when on a call	37	40	33	26	30	37	47	41	21	41	30	52	30	44
Could not receive a call	35	32	38	30	33	38	32	40	15	35	40	49	26	46
Unable to use mobile data service (websites not loading, unable to stream/watch videos online, unable to use social media etc.)	35	35	34	38	41	38	27	24	30	36	28	42	35	34
Unable to send a text	23	23	22	22	22	24	19	25	10	22	20	37	19	27
Unable to receive a text	21	20	22	17	21	22	22	21	13	18	19	33	16	27
Other specify	2	1	2	-	1	3	1	3	1	1	2	2	1	2

Q.20b You said that you experienced a loss of signal in the last month. What did you experience? – MULTI – RANDOMISE – SHOW SCREEN
Base: All experiences of lost signal – 923

**Caution small base*

Improvement to Internet access to Wi-Fi at home on your mobile

There are notable perceived improvements when connecting to Wi-Fi in the home with half of those with broadband noting an improvement. This highlights the importance of broadband services in accessing mobile services, returning to levels last seen in 2017.



- ANY Yes Improve	50
- ANY Yes Worse	4
Net diff	+46

2017 - ANY Yes Improve	53
2019 - ANY Yes Improve	42
2022 – ANY Yes Improve	38

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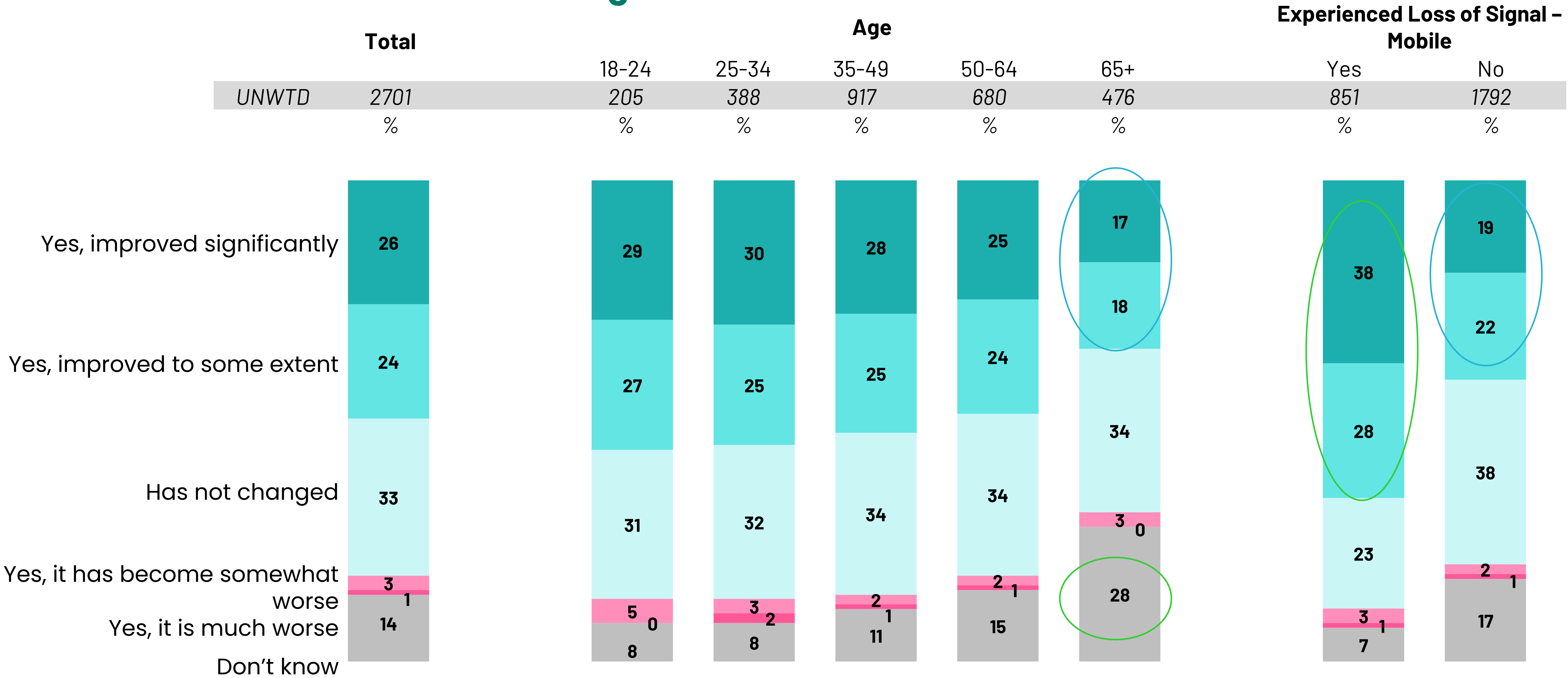
Q21 Does connecting to the Wi-Fi service in your home improve your internet access experience on your handset?
Base: All with broadband 2,701

( ) - 2022

Incidence of Wi-Fi improving internet access on mobile x demographics

Half of the sample believe connecting to Wi-Fi improves internet access, increasing since 2022. Those who have experienced loss of signal display higher levels of improvement, indicating that this is a potential method used to combat loss of mobile signal.



	Total		18-24	25-34	35-49	50-64	65+		Yes	No
NET (Improved)	50		56	55	53	48	35		66	42
NET (Worse)	4		5	5	3	3	3		4	3

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Q21 Does connecting to the Wi-Fi service in your home improve your internet access experience on your handset?
Base: All with broadband 2,701

Perceptions of 5G vs 4G

There is clear awareness of the improved connectivity of 5G services, with higher rates of agreement in regard to faster speeds, stability, and general performance.

NET (Agree)	59	55	52		30	34	35
NET (Disagree)	4	5	5		19	14	15

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Q. 38 Your mobile data is often delivered over 4G or 5G network technology, indicated by a “4G” or “5G” appearing in the top right hand corner of your phone screen. We want to gather your impressions on the differences you perceive when your mobile data is delivered over a 4G compared to 5G service, and vice versa.

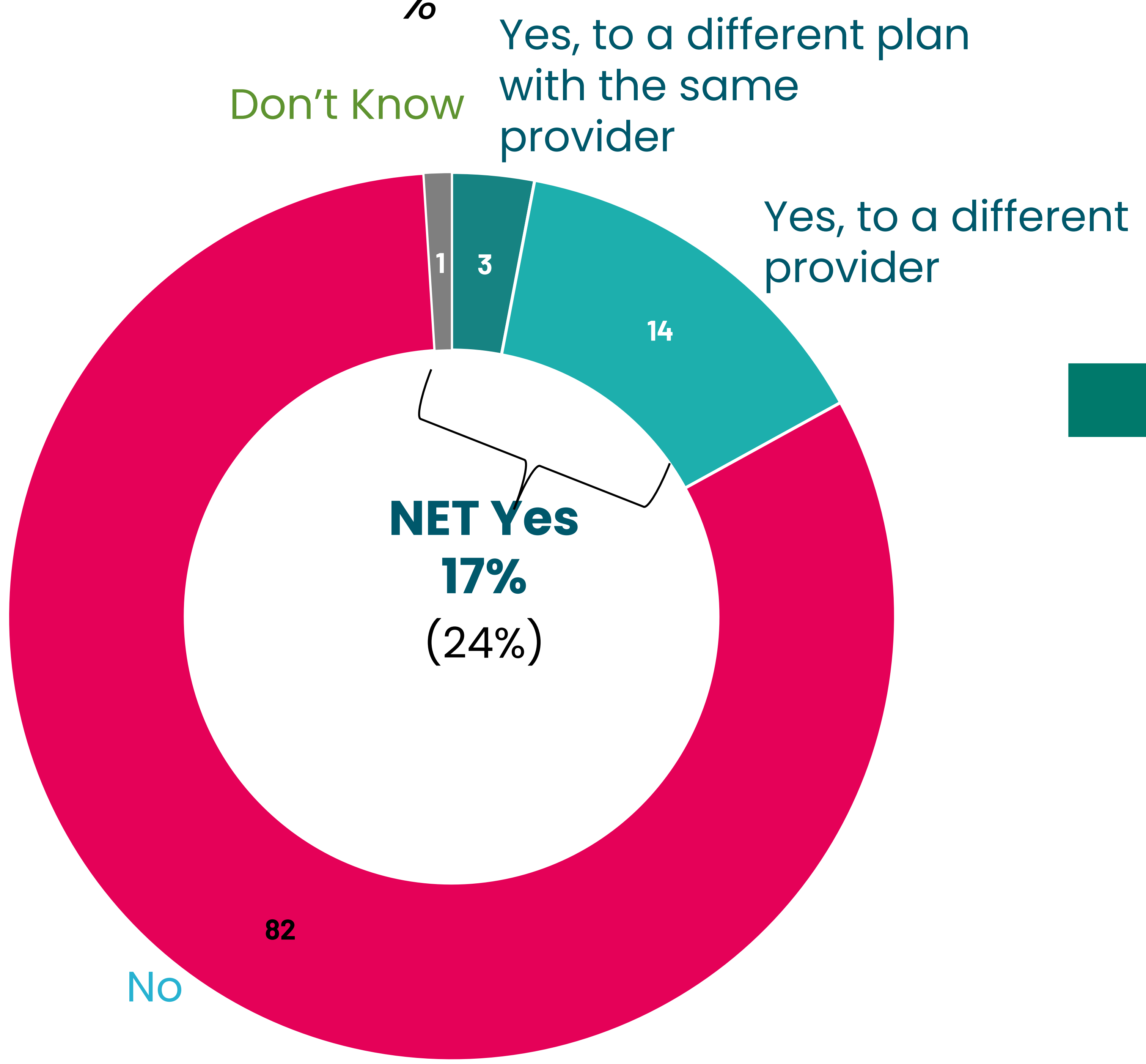
Base: All have mobile data available 5G -1297 4G - 1302

SWITCHING

Incidence of switching network provider or plan in the last 3 years (for which reasons)

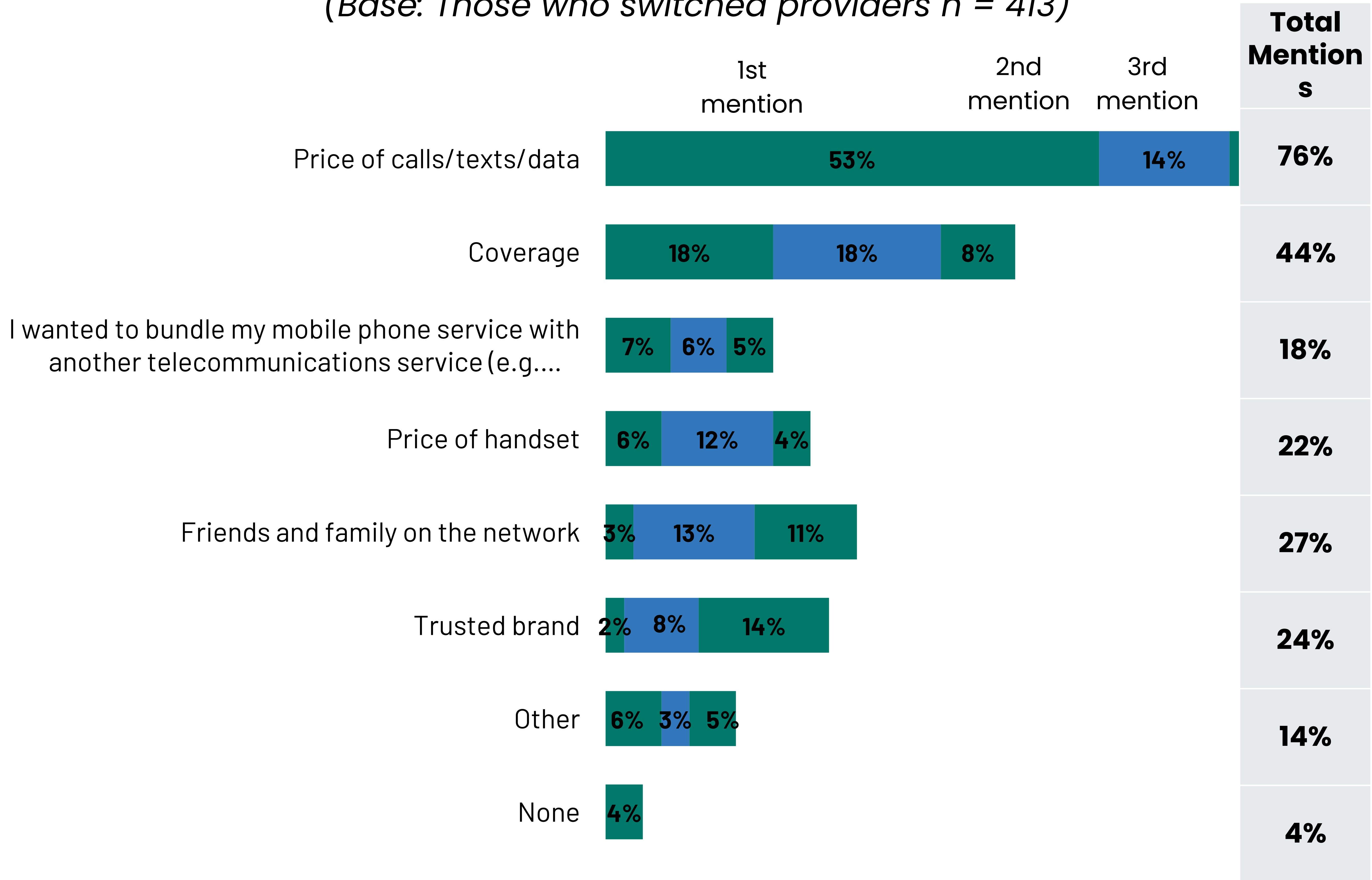
There remains an apathetic market, with less than 1 in 5 noting they have switched in the last 3 years. Price is the catalyst for switching for those that have.

Changed mobile phone plan or provider
%



() = data 2022

Reasons you switched mobile provider
(Base: Those who switched providers n = 413)



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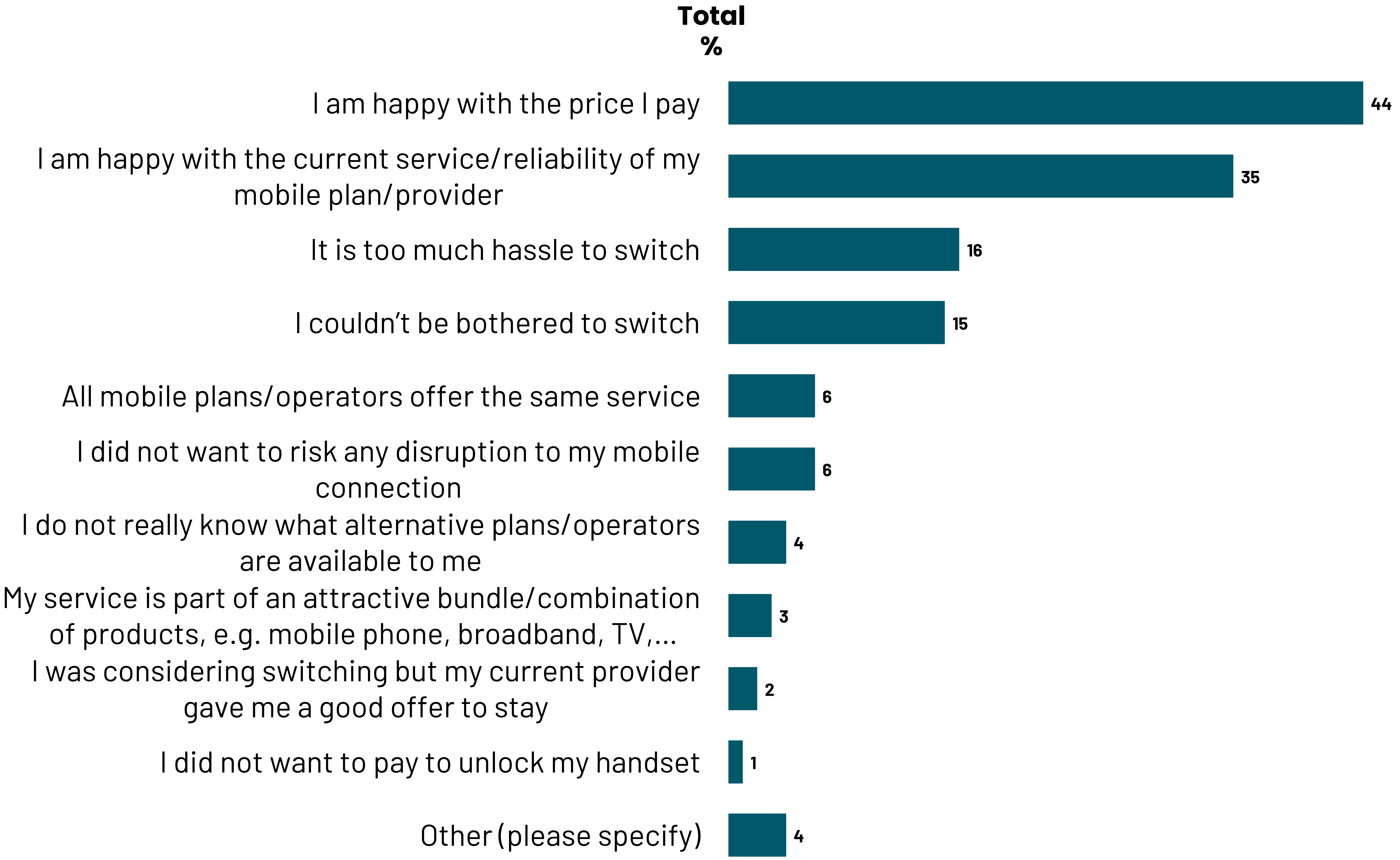
2025: Q26 Have you changed your mobile phone service for any reason in the last 3 years?** 2022 Q.27 Have you ever changed network provider for any reason?
2025: Q.28a What were the top 3 reasons that you switched mobile plan operator? 2022: Q.27b [If yes] What was the reason that you switched network provider?
Base: All have mobile : 2961

***wording change 2025*
**Caution small base*

Main reasons for not switching mobile provider in the past 3 years

Price again plays a key role in decision-making with the most cited factor in remaining with their providers being price satisfaction.



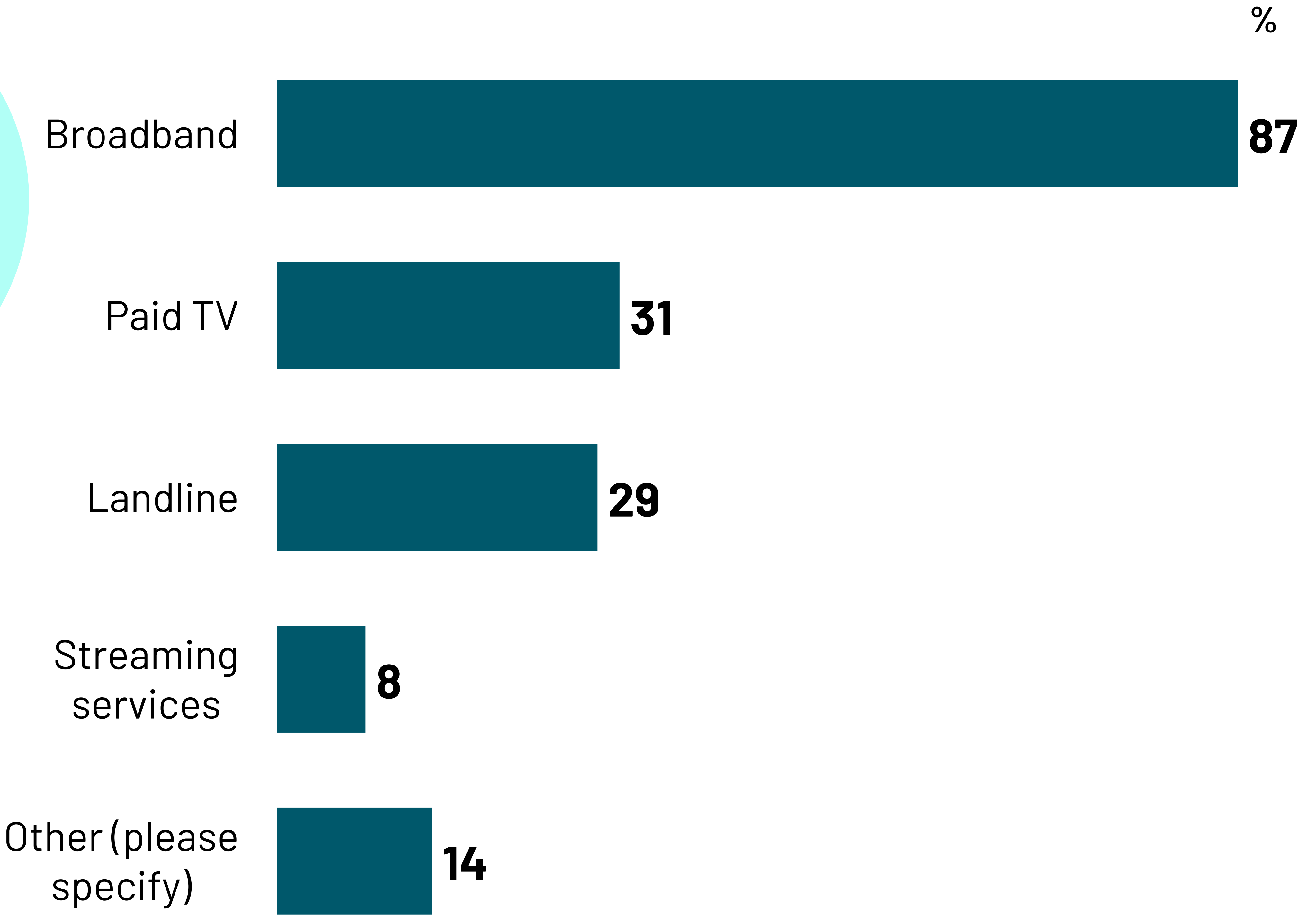
Q26a Why have you not switched mobile plan/operator in the past 3 years?
Base: All that have not switched in past 3 years 2426

Other services included in the bundle you switched to

Among those looking to bundle their mobile service with other services, broadband is most popular (87%).

18%
of those switching providers did so to bundle services

What services did they bundle?



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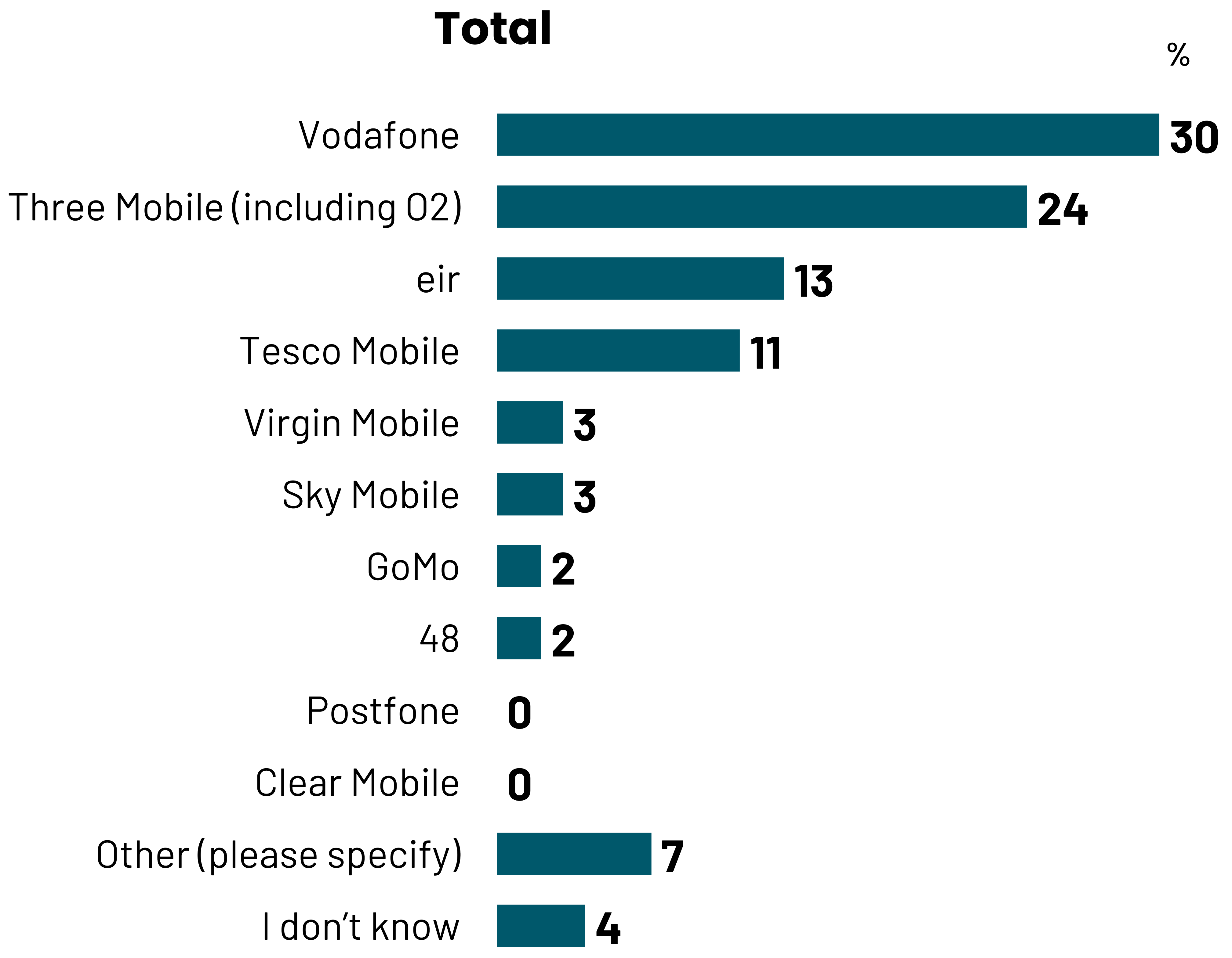
Q28b What other services did you bundle your mobile phone service with?
Base: All that switched to bundle services 79

Previous mobile phone network provider

There has been a marked increase in those noting a move away from Tesco Mobile in 2025, compared to previous waves, albeit the three largest providers continue to have the majority share of switchers.

2019	2022
37%	42%
28%	28%
23%	15%
4%	4%
N/a	1%
-	-
2%	2%
N/a	1%
N/a	-
0%	0%
2%	1%
2%	3%



Q28c Who was your previous mobile plan operator before you switched?
Base: All who have ever switched network provider 413

Incidence of ever switching mobile service plan or provider

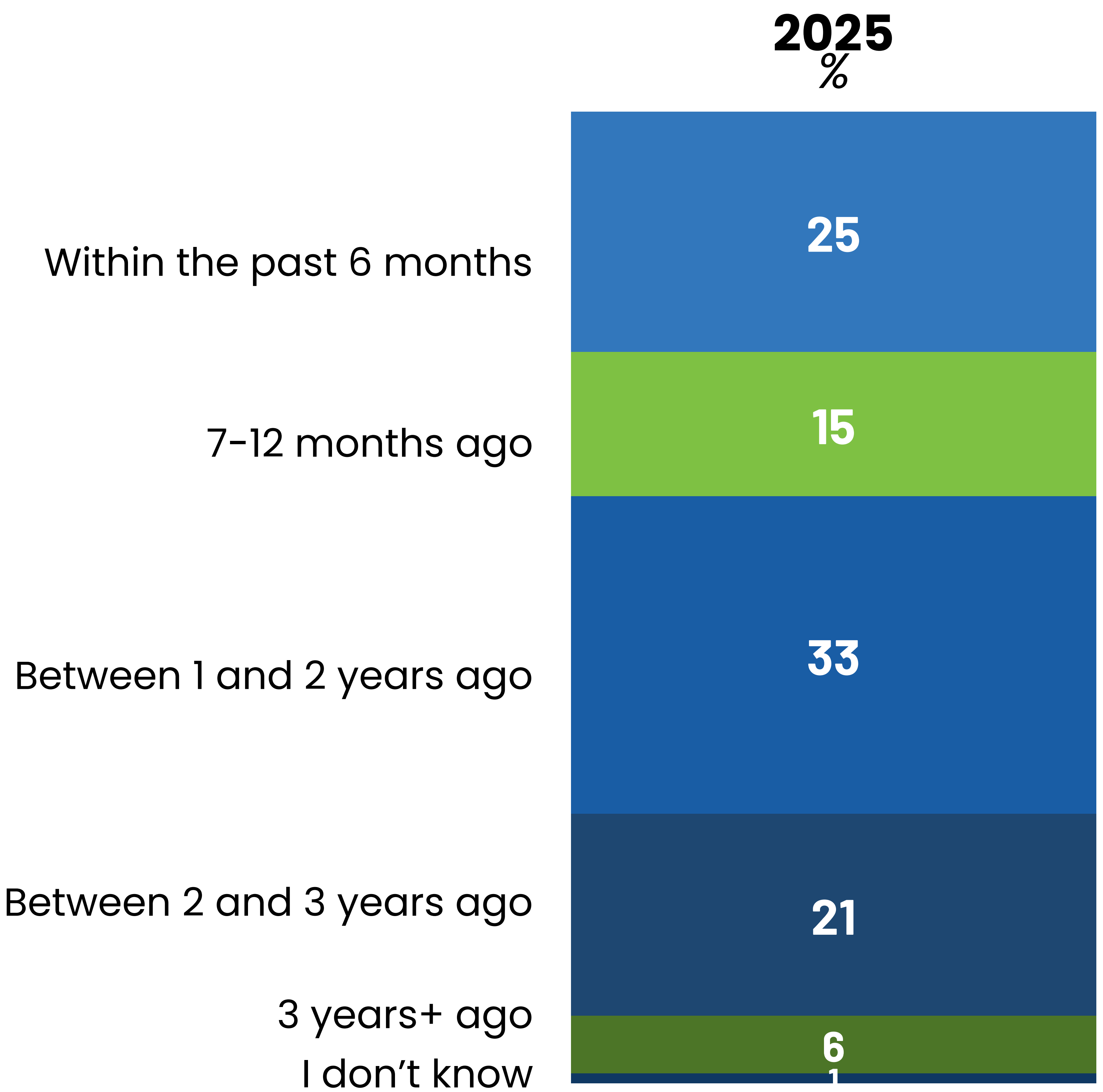
Have you changed network provider in the last three years?	Total	Gender		Age					Region			
		Male	Female	18-24	25-34	35-49	50-64	65+	Dublin	Rest of Leinster	Munster	Connaught/ Ulster
UNWTD	2961	1394	1566	228	424	964	733	575	859	791	806	505
	%	%	%	%	%	%	%	%	%	%	%	%
Yes to a different plan with the same provider	3	3	4	5	5	4	3	2	3	4	3	3
Yes to a different provider	14	13	14	14	19	15	13	9	14	14	10	18
No	80	81	80	80	74	81	83	80	80	80	82	79
Don't know	17	16	17	18	24	18	15	11	17	17	13	21

What was the top 3 reasons that you switched network provider?	Total	Gender		Age					Region			
UNWTD		Male	Female	18-24	25-34	35-49	50-64	65+	Dublin	Rest of Leinster	Munster	Connaught/Ulster
	413	195	218	32	81	145	96	57	117	112	83	101
	%	%	%	%	%	%	%	%	%	%	%	%
Price of calls/texts/data	53	59	48	42	54	52	57	65	56	51	51	55
Coverage	6	3	8	5	10	5	4	4	7	6	8	2
I wanted to bundle my mobile phone service with another telecommunications service (e.g. Broadband, Paid TV, Landline)	18	20	17	21	14	21	16	17	12	21	21	22
Price of handset	3	1	4	-	5	2	4	-	1	6	1	3
Friends and family on the network	2	3	1	4	1	4	2	-	3	2	1	3
Trusted brand	7	4	10	5	6	8	9	8	6	6	7	10
Other	6	7	5	14	7	5	3	4	7	6	5	5
None	4	2	7	8	3	4	5	3	8	2	6	1

Who was your previous mobile plan operator before you switched?	Total	Gender		Age					Region			
		Male	Female	18-24	25-34	35-49	50-64	65+	Dublin	Rest of Leinster	Munster	Connaught/Ulster
UNWTD	413	195	218	32	81	145	96	57	117	112	83	101
	%	%	%	%	%	%	%	%	%	%	%	%
Clear Mobile	30	29	30	29	18	30	38	37	24	27	26	43
Vodafone	24	21	27	22	31	23	26	18	28	28	21	18
Three Mobile (including O2)	13	15	11	-	13	15	17	14	10	13	13	16
eir	11	13	9	17	13	11	8	4	17	10	12	5
Tesco Mobile	3	5	2	6	3	2	3	7	6	2	2	3
GoMo	3	4	2	5	-	2	1	11	1	7	1	2
Virgin Mobile	2	1	4	6	3	3	-	-	1	1	2	6
Sky Mobile	2	1	3	3	4	2	1	-	3	1	5	1
48	0	0	-	-	-	-	-	1	-	-	1	-
Postfone	-	-	-	-	-	-	-	-	-	-	-	-
Other (please specify)	7	9	6	10	10	8	5	3	6	6	12	7
I don't know	4	3	5	2	6	3	2	6	5	6	5	0

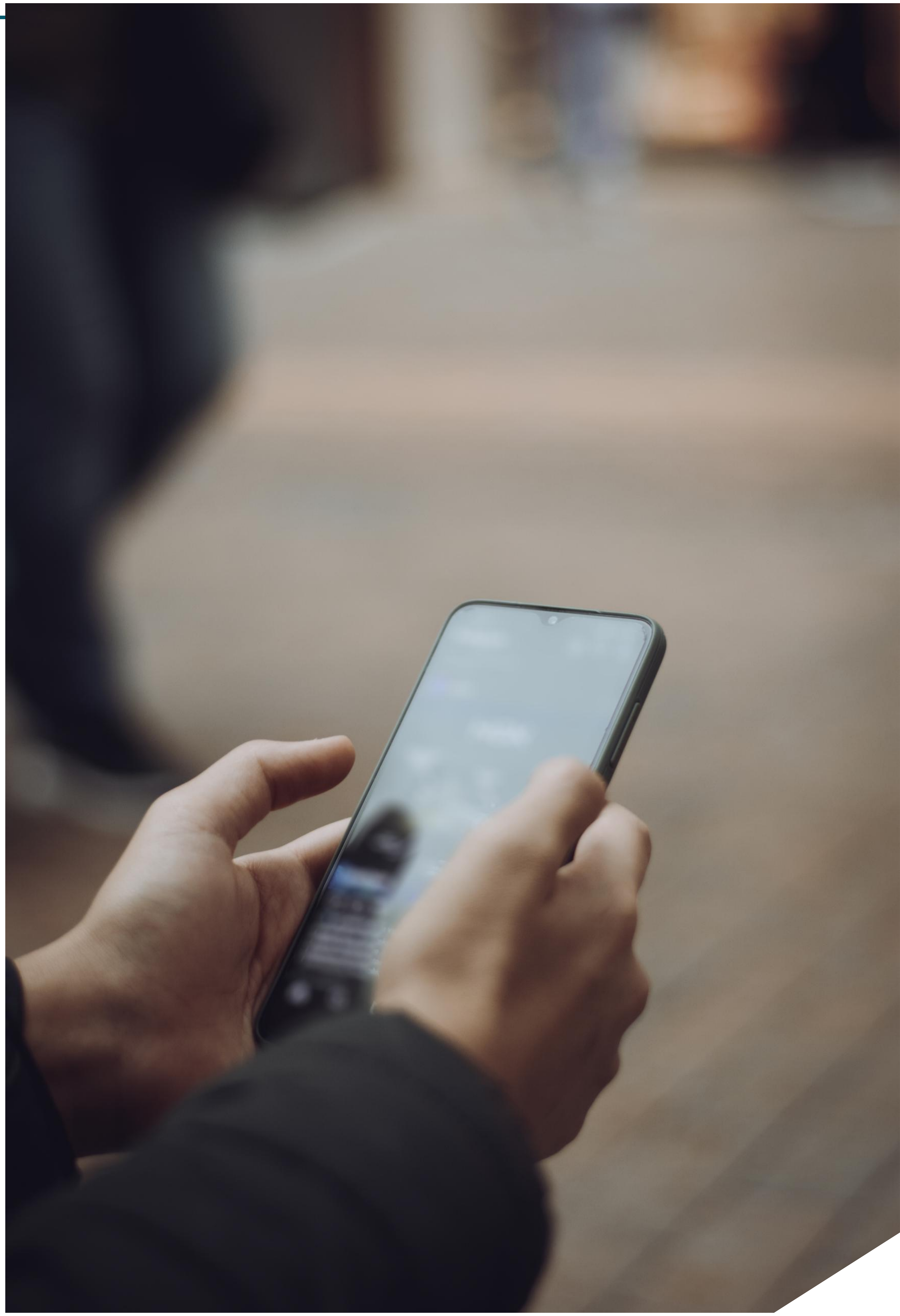
Most recent switching of mobile phone operator

Among those switching in the last 3 years, a sizeable minority have switched in the last 12 months (40%).



Given a change in wording, previous data on this is not comparable

Within last 12 months **40%**



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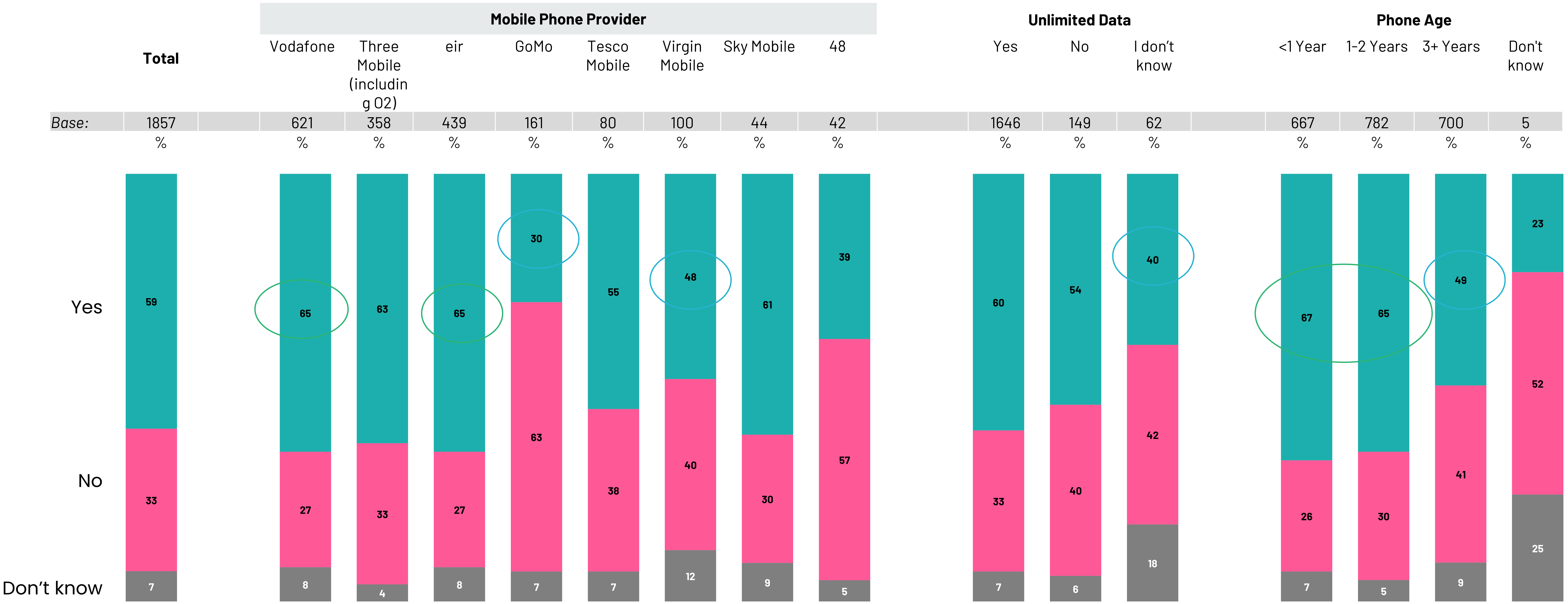
Q28 When was the last time you switched mobile phone operator?
Base: All who have ever changed network provider 413

Incidence of in-contract plans with mobile service provider

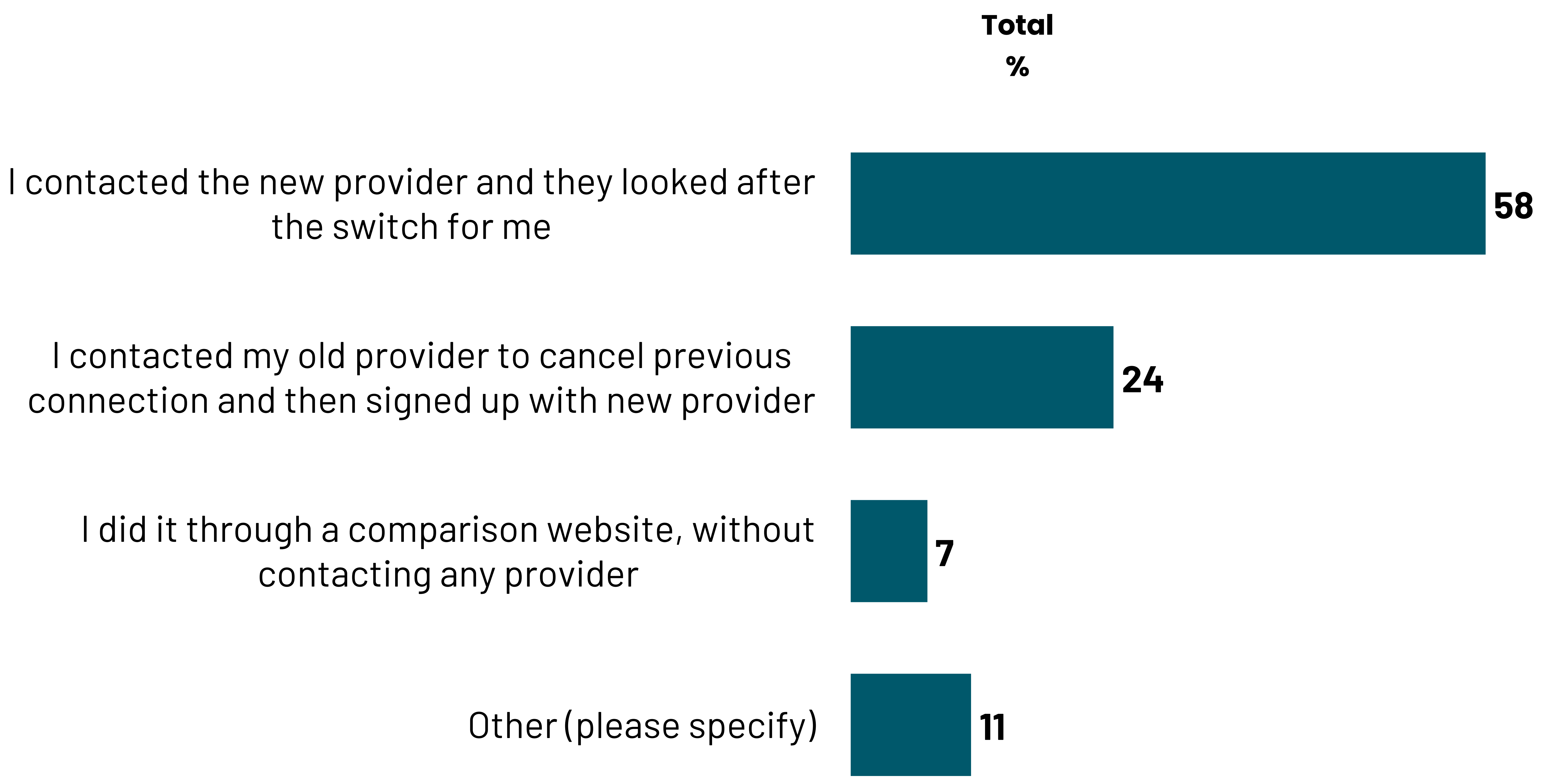
3 in 5 are currently in contract, with much higher for Vodafone and Eir customers. Those with newer phones are also more likely to be in-contract indicative of the expense tied to purchasing phones.



Q27 Are you currently in a contract with your mobile service provider, i.e. you cannot switch currently without incurring a cancellation fee?
Base: All billpay customers : 1857

Approach to contacting for those switching mobile operator

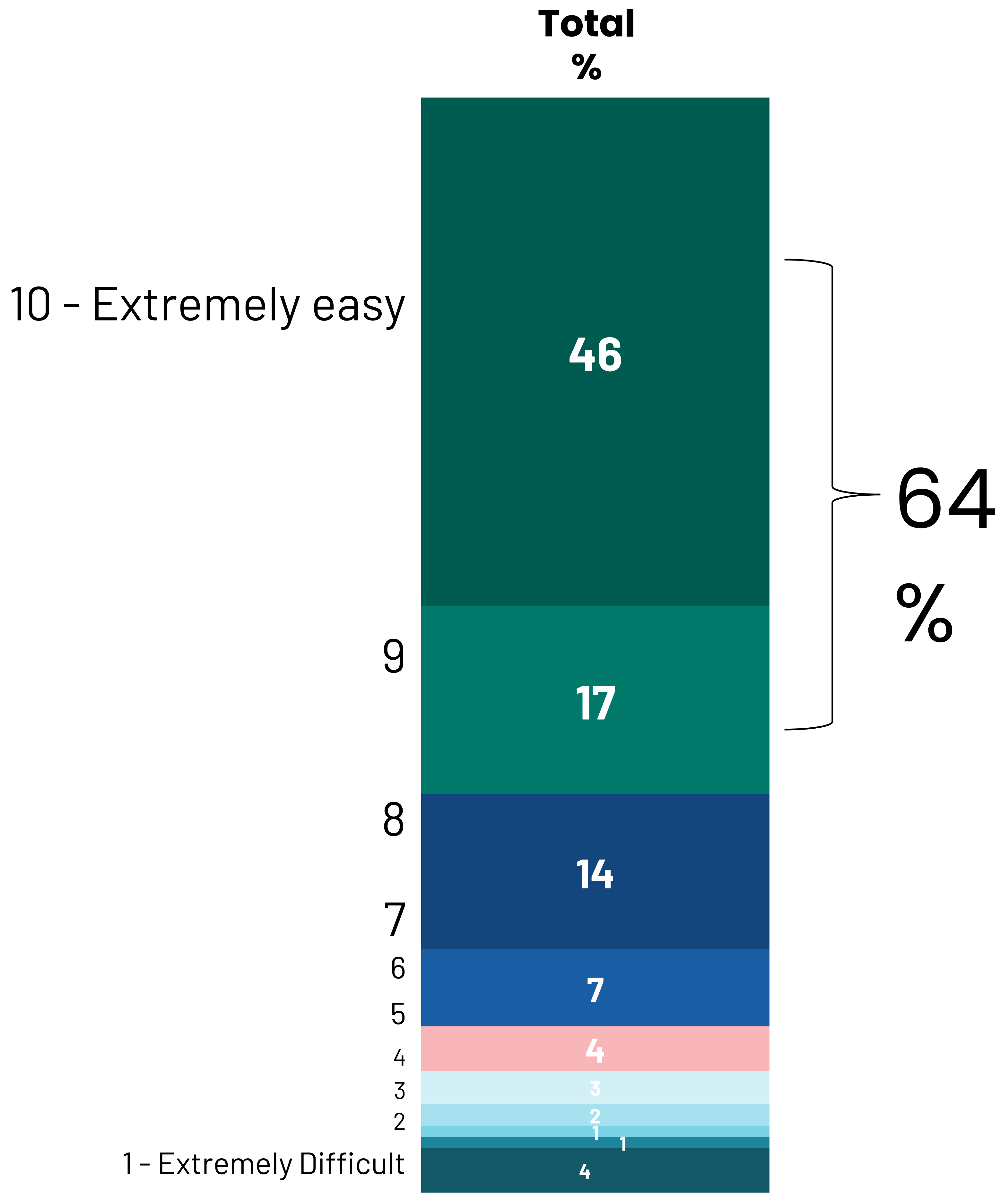
For 3 in 5, their new provider was the contact point, with minimal usage of price comparison websites.



Q28d Who did you contact to switch mobile plan operator?
Base: All who have ever switched network provider 413

Rating the process of switching mobile plan operator

Switching is a largely easy process for the vast majority of customers with 64% giving a 9-10 score.



There are minimal differences by demographics, illustrating a smooth experience regardless of age, region, disability, etc.

Q28e How easy was it for you to switch mobile plan operator, taking all aspects into account, e.g. time taken to switch, ease of process, etc. On a scale from 1-10 where 10 is "extremely easy" and 1 is "extremely difficult"?
Base: All who have ever switched network provider 413

Difficulty contacting and delays in the transfer to new providers are the notable issues raised by those giving a low score in regard to ease of switching.

11%

Gave a 1–5 (poor) score regarding switching experience

Reason for poor score

"2 days no service. Poor communication"

"Closing off old account. Process and s flawed. Still have bill credit I cannot access"

"Finding a person to talk to to help switch over. No people were available. I had to use my neighbour to do this."

"It took 3 weeks for last provider to switch my number over"

"Not easy to make contact"

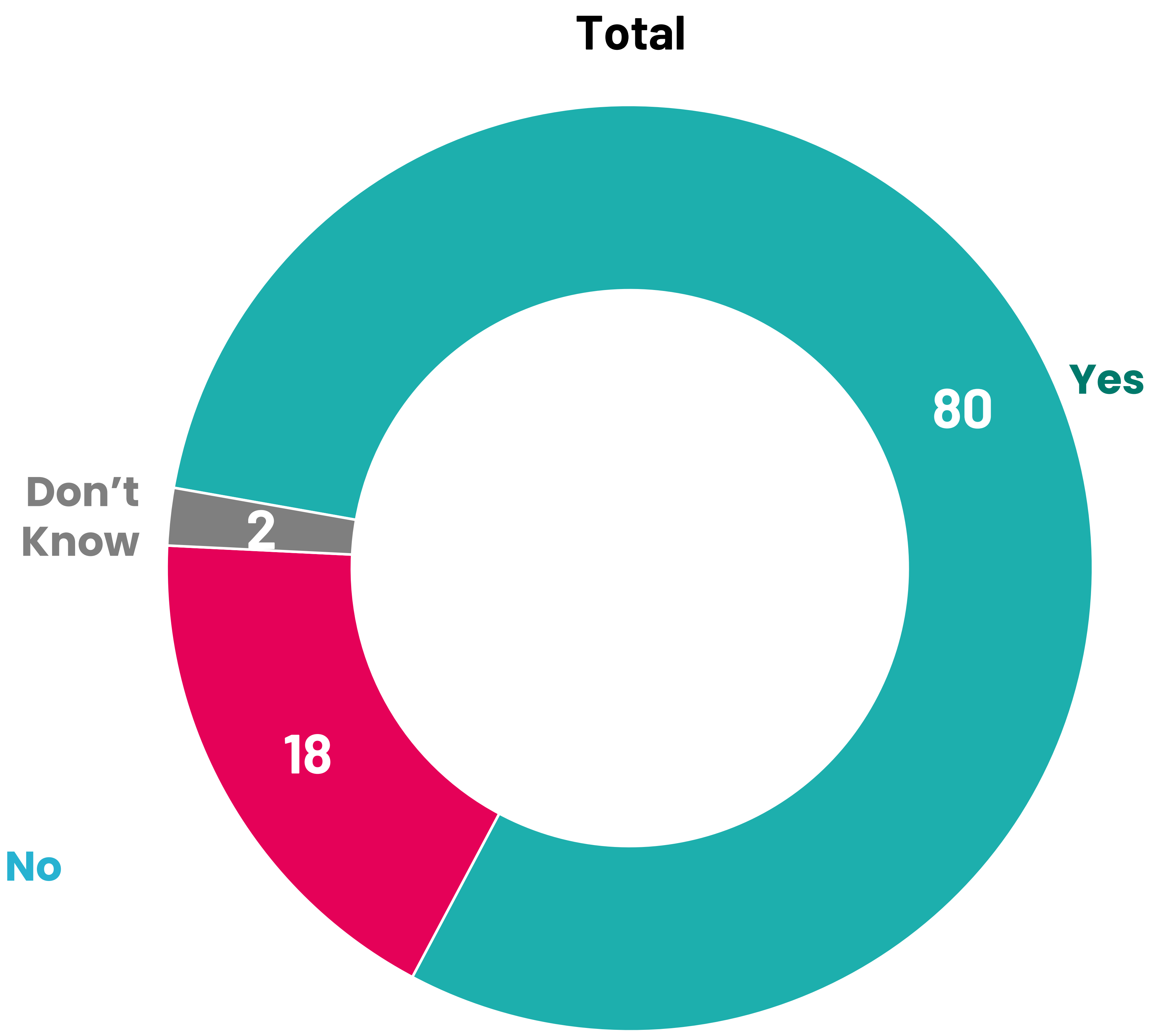
"They made a mess of the transition, it took ages to transition and the broadband hasn't been connected yet"

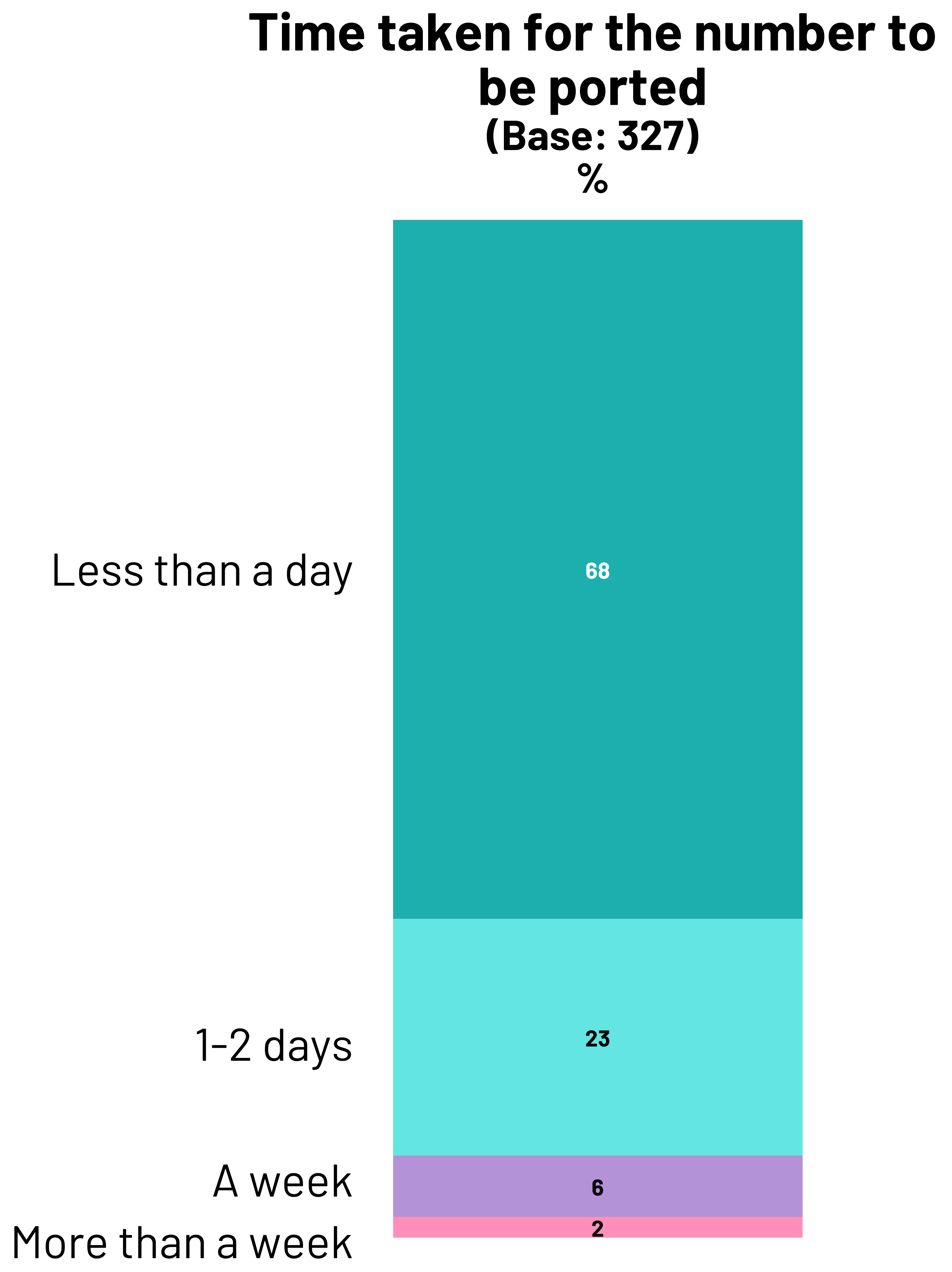
"Very slow to process cancellation of account with following 24 + hours without phone."

Q.29 What did you find difficult about switching mobile plan operator?
Base: n – 43*

Incidence of porting numbers when switching and the length of the porting process

The vast majority switching port their numbers, of which 2 in 3 note this took less than a day to complete, leaving a sizeable minority noting porting times of 1-2 days (23%) and a week (6%), with minimal mention of more than a week.



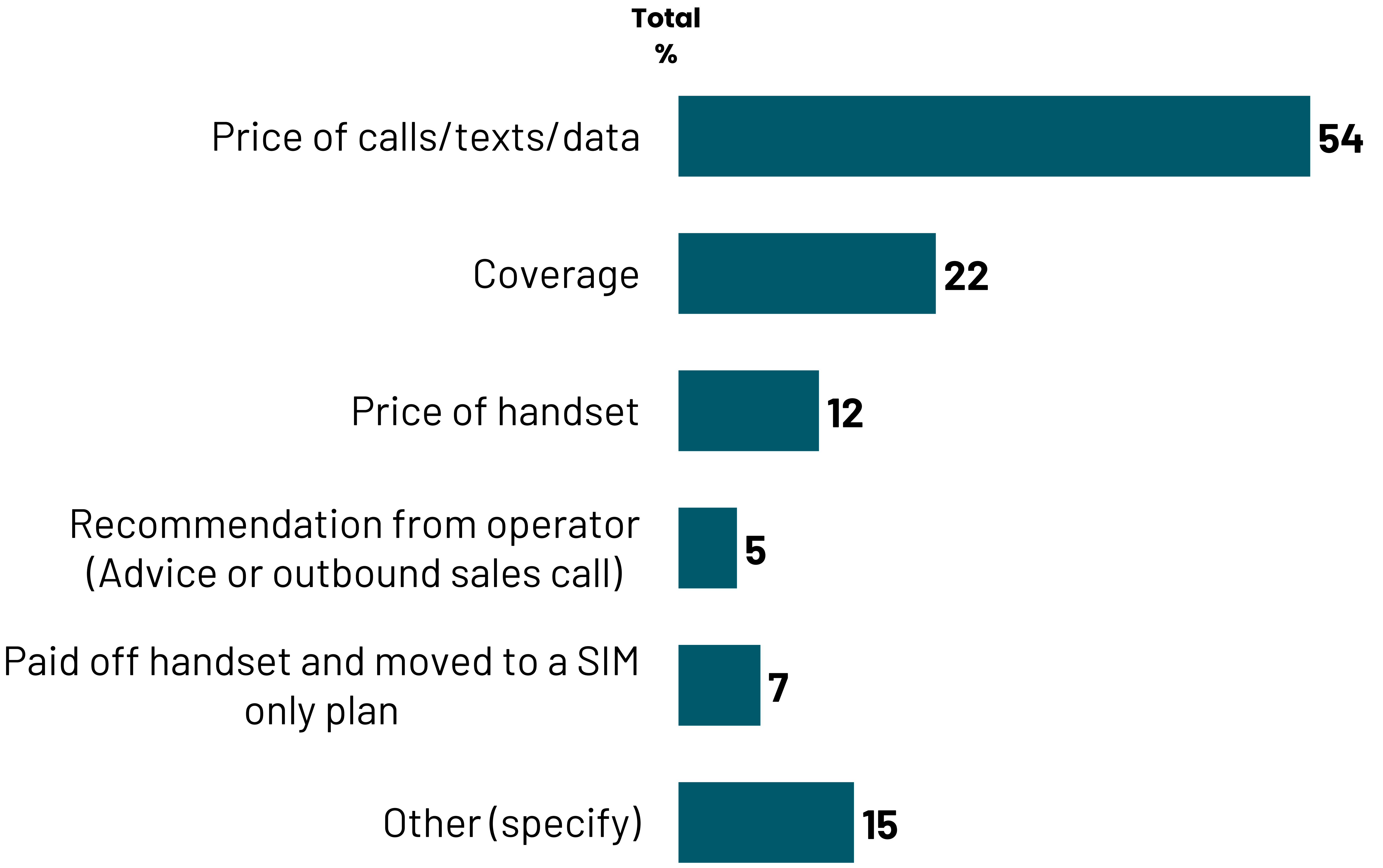


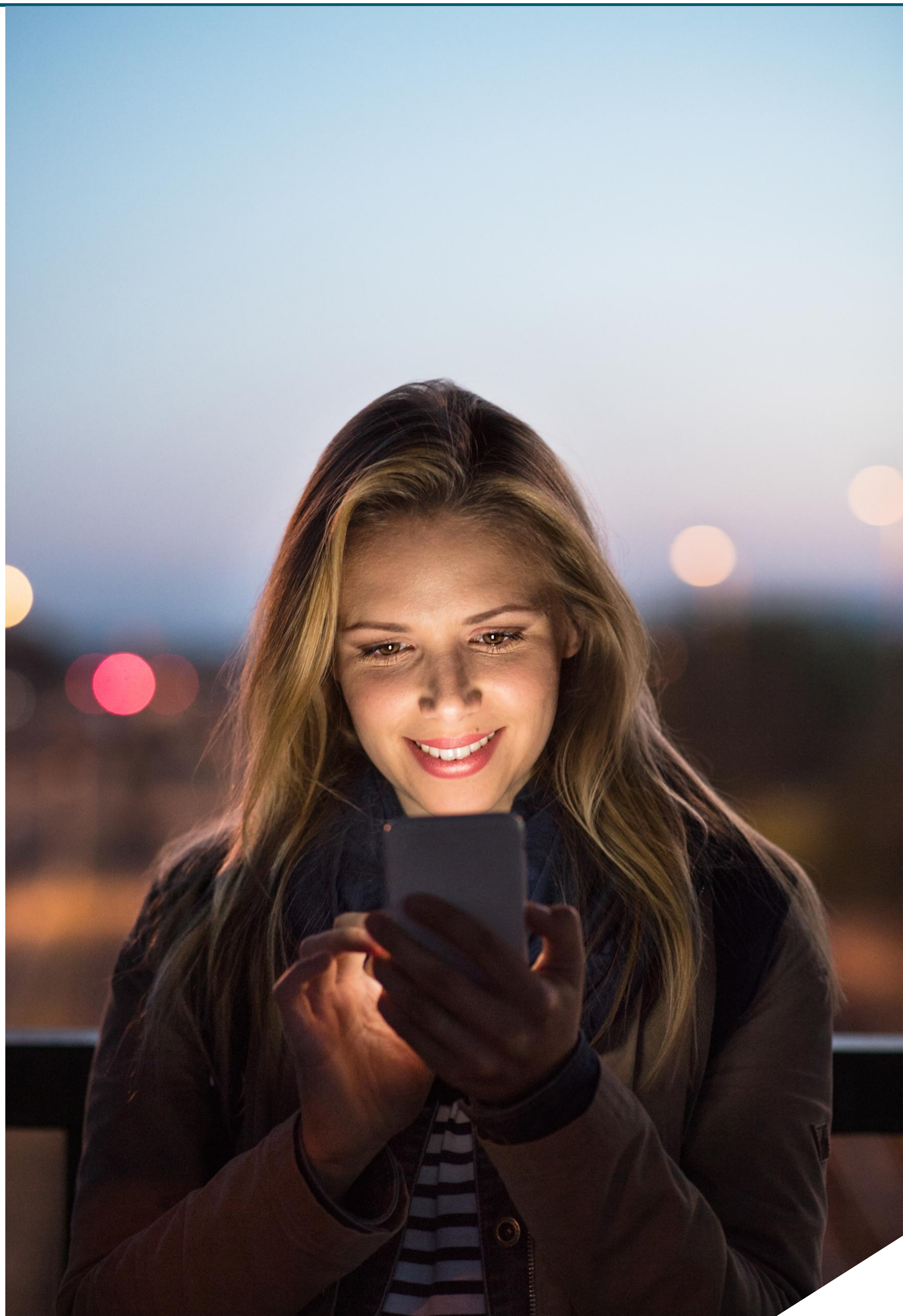
Q30 Did you port your number as part of switching provider?
Q31 How long did it take for your number to be ported?
Base: All who have ever switched network provider 413

INTRA-OPERATOR SWITCHING

Main reason for switching plan with current provider

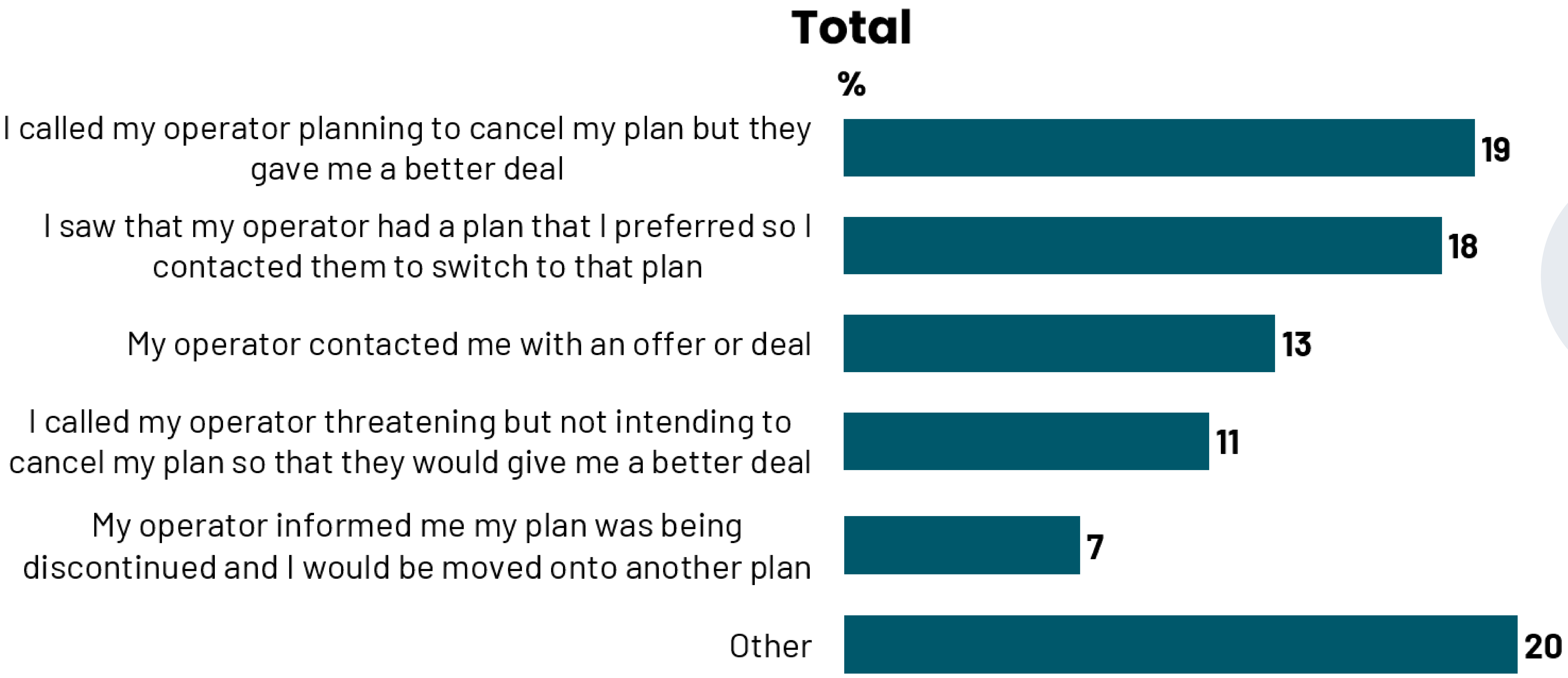
Again, price drives decision-making, with over half citing price as the leading factor in deciding to switch plans (but not providers).





Q32a What was the reason that you switched plan?
Base: All who switched plan with current provider - 100

How was the switch initiated with existing operator

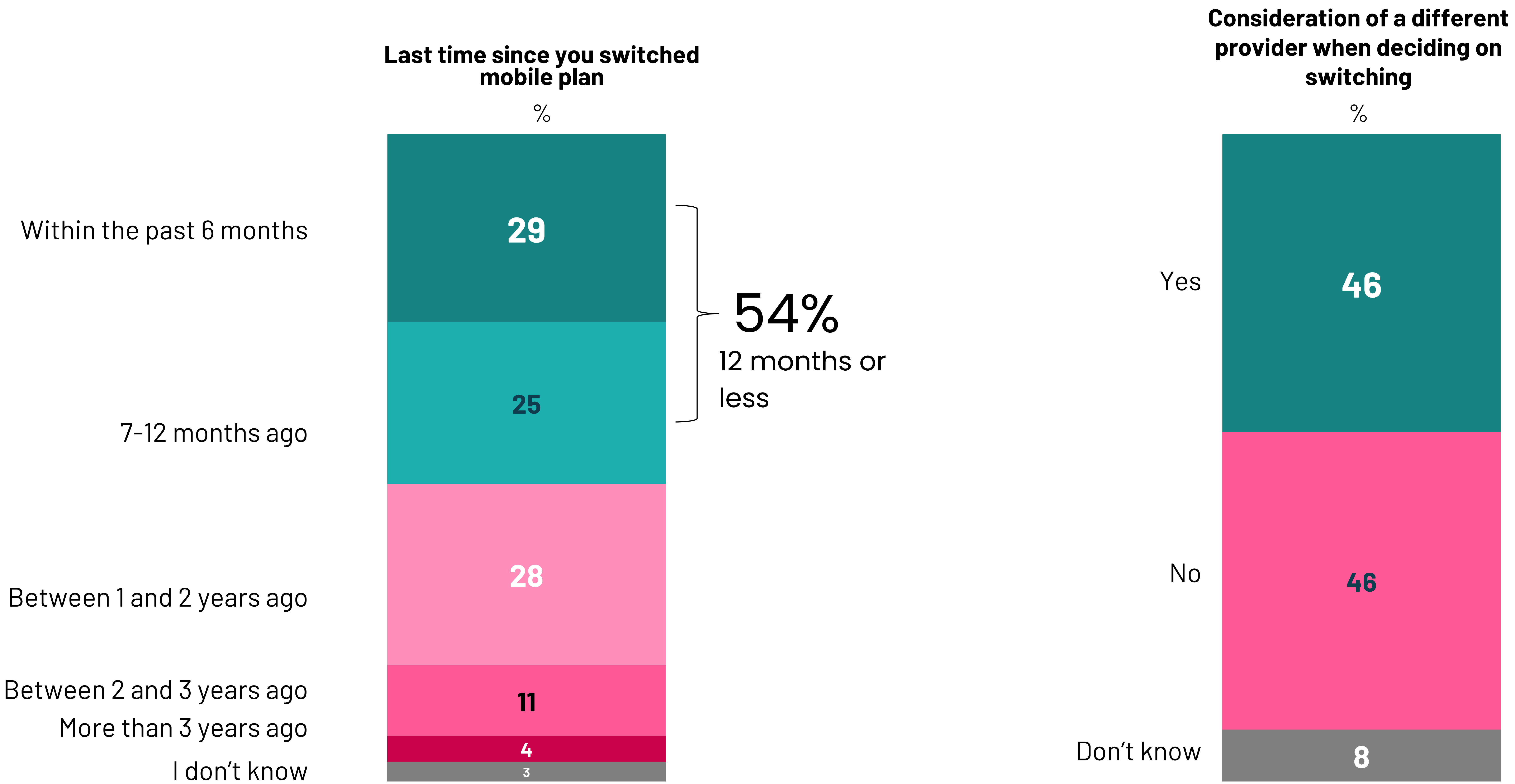


48% driven by proactivity from customer

Q32b When you changed your mobile phone plan with your existing operator, how was this switch initiated?
Base: All who switched plan with current provider - 100

Length of time since you last switched mobile plan and consideration of other providers when making the switch

Just over half switched in the last 12 months, with there being an even split in consideration of another provider around the time of the switching, once again highlighting the proactive nature of these customers.

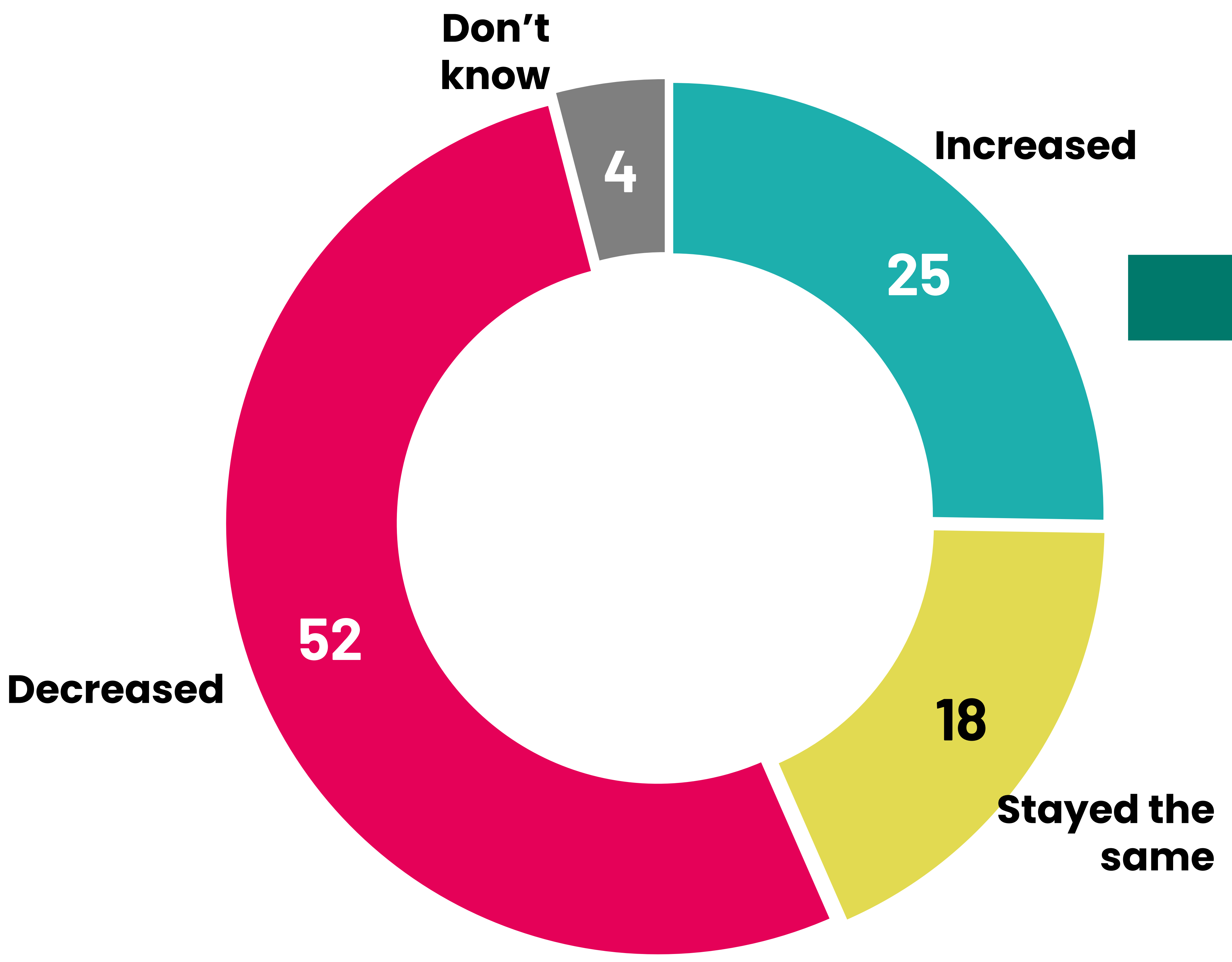


Q32c When was the last time you switched your mobile plan?
Q32d When you switched plans with the same provider, did you consider switching to a different provider at any point during the decision-making process?
Base: All who switched plan with current provider - 100

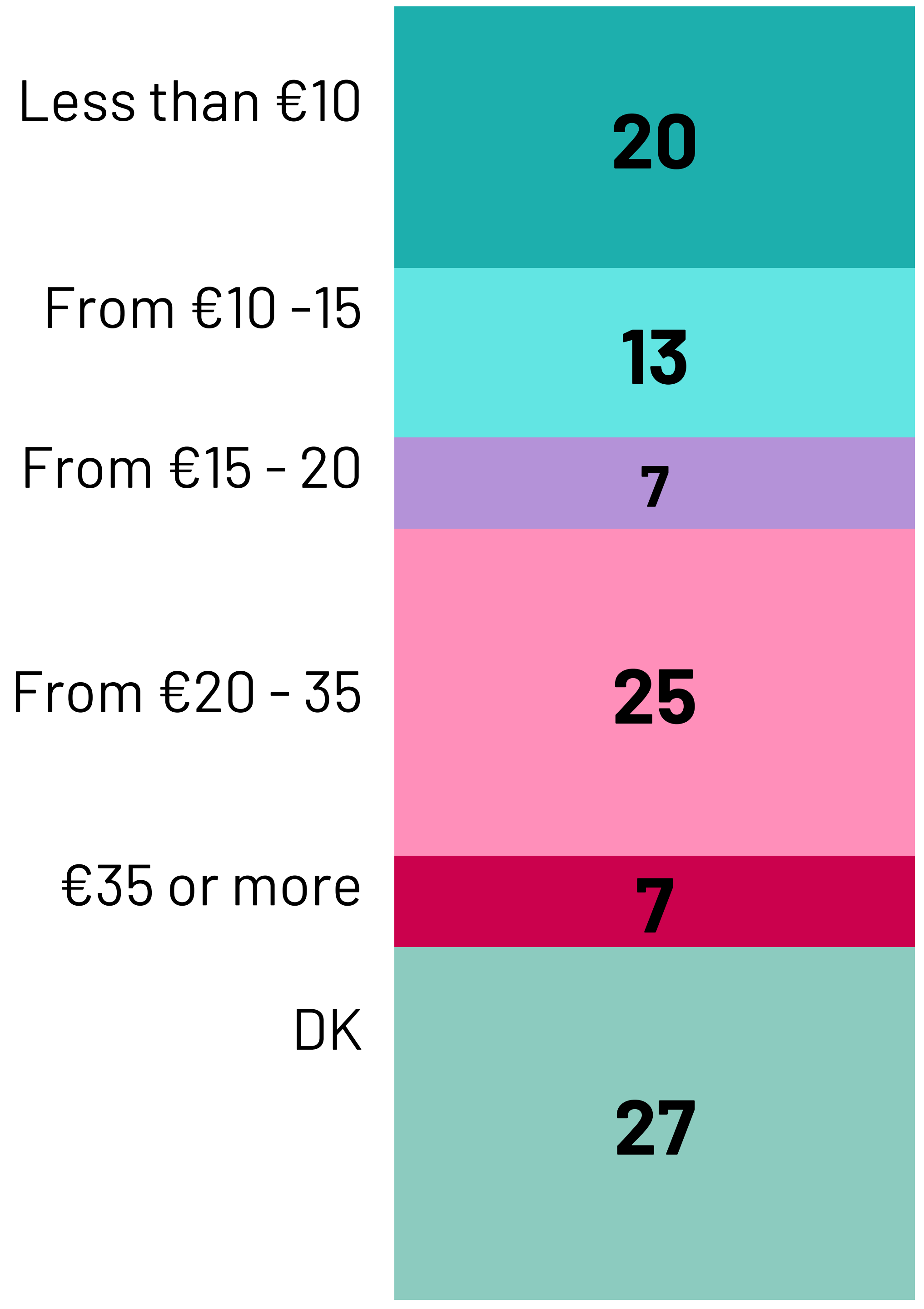
Incidence of price change when switching

For half of those switching plans, the price decreased (reducing on average by €20.71), while 1 in 4 noted an increase (increasing on average by €21.01).

Total

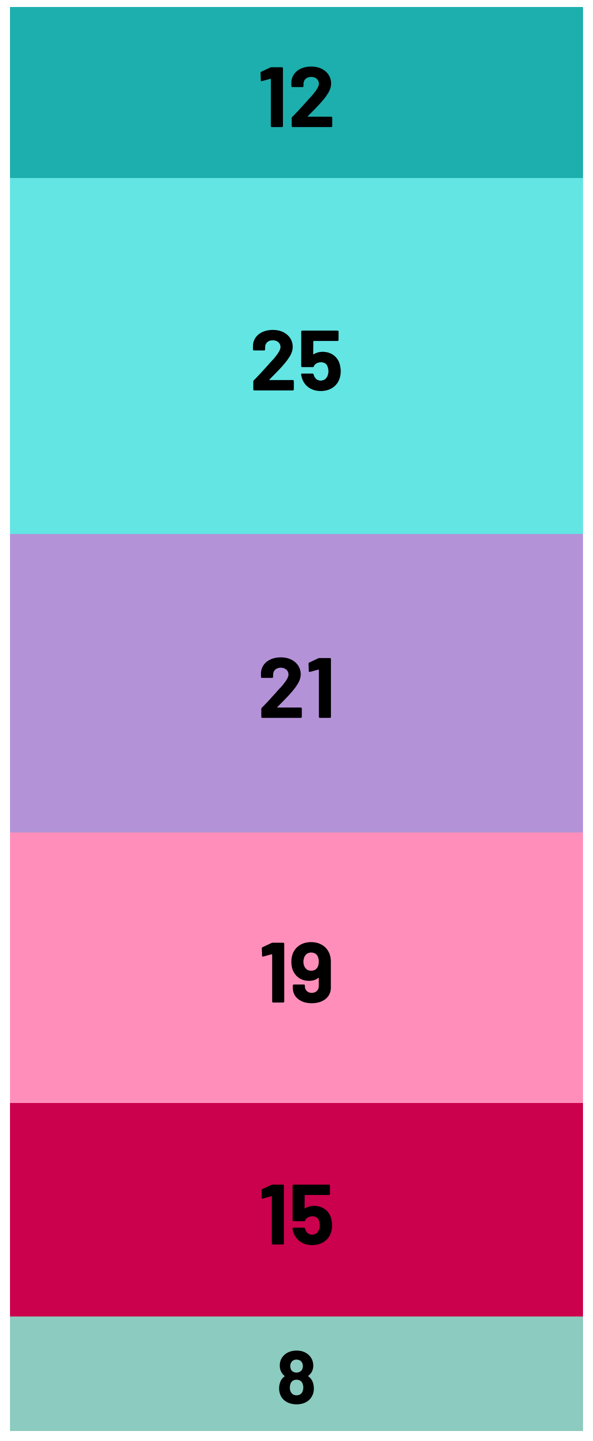


How much did the plan increase by?
(Base: 23*)
%



Mean €21.01

How much did the plan decrease by?
(Base: 50*)
%



Mean €20.71

*Caution low base size

Q32e When you switched your mobile plan did the price of your plan increase, decrease, or stay the same?
Q32f1 About how much did the monthly price of your plan increase when you switched?
Base: All who switched plan with current provider - 100

SUMMARY

Key Highlights

Ownership and Spend

Almost **universal ownership of mobile phones**, with 7% having multiple phones, and 11% having a phone paid for by their employer – unsurprisingly, 70% of those with multiple phones have a phone paid for by their employer. Billpay remains as the dominant method for paying for mobile services (63%). The market remains sticky with minimal recent switching.

Of those with a mobile phone, **93%** now have **smart phones,** with increases seen among older and working class cohorts.

Landline ownership continues to decline rapidly, now standing at 23% from 36% in 2022. Older cohorts continue to cite higher ownership (50% of 65s+).

For 1 in 5, their mobile service is **bundled** with another service, most frequently **broadband** (91% of those bundling). These bundles tend to be more expensive and concentrated among billpay customers.

Unlimited data is a very common part of mobile services, with 4 in 5 having this. This is less common among older cohorts.

Although the majority continue to buy their phones new, there has been a marked increase in **second-hand purchasing (from 6% in 2022 to 13% in 2025).** This is a promising sustainable shift. However, when we consider the full sample, the majority of phones are 2 years old or less, highlighting relatively quick turnaround periods for ownership.

Average monthly Bill pay spend is **€39.75,** a 5% increase on 2022. Average monthly Prepay spend is **€19.84**, decreasing from €20.43 in 2022. Prepay is getting cheaper while bill pay is getting more expensive. The vast majority of customers have no issues paying for mobile service (71%), however there are signs that those with disabilities are more likely to struggle. In-contract increases are noted by 3 in 10 billpay customers.

Key Highlights

Usage Patterns & Satisfaction

There has been a **surge in 5G use** (up from 17% in 2022 to **60%** in 2025). Those over 50 show less usership at this stage, continuing to rely more so on traditional voice calls and SMS.

Possibly linked to the increased usage of the more reliable 5G service, **cited usage of mobile services have increased** also across all key areas (inside home, surrounding home, in another location, travelling between locations). Having access to these mobile services is deemed most important while in the home, however, access is vital for at least half of the sample across all locations.

When focusing on specific mobile services, there is a clear hierarchy, with **traditional voice calls, instant messaging, social media, and sending / receiving SMS** being the most frequently used and most essential services according to customers.

> There are clear demographic differences in regard to service usage and importance, with younger, Dublin-based, middle-class cohorts showing higher usage of all internet-based services, while older cohorts and those in rural areas are more likely to use the more traditional voice call and SMS services, as well as assign more importance to these services.

It is encouraging to see **increasing satisfaction** regarding mobile coverage both within the home (54% 9-10 score) and in other areas (46% 9-10 score), following a period of stagnation across previous waves.

> Dubliners, those over 65, and GoMo customers show highest levels of satisfaction.

How do Customers place calls

There is a split in usership, with **54% using the default phone app and 42% primarily using WhatsApp**.

> Younger, more urban / Dublin based consumers are more likely to use WhatsApp, as well as those who view internet-based mobile services as most essential

However, it is important to highlight that among those preferring WhatsApp, there remains a **reliance on the default app among this cohort in cases of poor connectivity**, with **3 in 10** turning to their default app when out of home, and **1 in 5** doing so in home as well.

There is **much less reliance on alternative apps among those who prefer the default phone app** in cases of poor connectivity. Instead there is a focus on relocation and Wi-Fi access.

When **using Wi-Fi to make calls** (67% do so), the majority note there is an **improvement in their voice call experience** (57%).This is more of a feature in areas outside of Dublin, particularly Munster.

Key Highlights

Customer Experience of Service & Perceptions of 5G

1 in 3 have experienced signal loss in the last month, with higher frequency among rural and younger cohorts. These are most common in the home (34% daily issues) and surrounding the home (29% daily issues).

When experiencing signal loss, the most common problems are **dropped calls (45%), inability to make calls (40%), and poor data service (40%).**

A way of combatting signal loss is Wi-Fi usage, with **half noting improved internet access when connecting via Wi-Fi**. This increases to **66% of those who have experienced signal loss**, indicating that this is a potential method used to combat loss of mobile signal.

There is clear **awareness of the improved connectivity of 5G services** when compared to 4G, with much higher associations with fast, stable, and quality connections via 5G connections.

Switching

The market remains sticky with only **17% switching in the last 3 years**. Vodafone (30%) and Three (24%) have the highest proportion of customers switching away from them. **Price drives decision-making** in this space with 53% noting this as their first reason for switching. This remains the same both when switching providers and switching plans with the same provider. Indeed, price also drives decisions to stay with current plans, with 44% of those not switching noting price satisfaction as the key reason for this.

There is minimal usage of price comparison websites, with focus more so on the new provider to initiate the switch.

The switching process is relatively simple with **64% noting it was extremely easy**. The vast majority **port their number when switching (80%), with 68% of these noting completion within one day**, reflecting this ease of switching process.

Among those switching plans but not providers, there is often a **proactive approach** needed to bring about a switch in plans, with **48% having to contact their provider**. Indeed, just under half of those switching plans, considered alternative providers as well, highlighting a proactive subset of the market, considering both options. Internal switching often resulted in cheaper plans (52% note a decrease in cost).

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