Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q1 2025

Information Notice

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1. Background

ComReg collects statistical data from authorised operators on a quarterly basis. Not all such operators are included in this data collection (based on minimum revenue levels), but ComReg aims to represent 95% of the total markets. This data includes information on subscriptions, lines, revenues, broadband speeds, minutes and data usage for both fixed and mobile voice and broadband. The data and charts included below are a subset of the information collected. The detailed presentations of data are available on the ComReg data portal www.comreg.ie/industry/electronic-communications/data-portal .

Data presented in this Summary of the Quarterly Key Data is based on questionnaires completed by certain authorised operators for the period from 1st January 2025 to 31st March 2025. The report is based on submissions from 55 active operators.

The report contains the following key charts/data:

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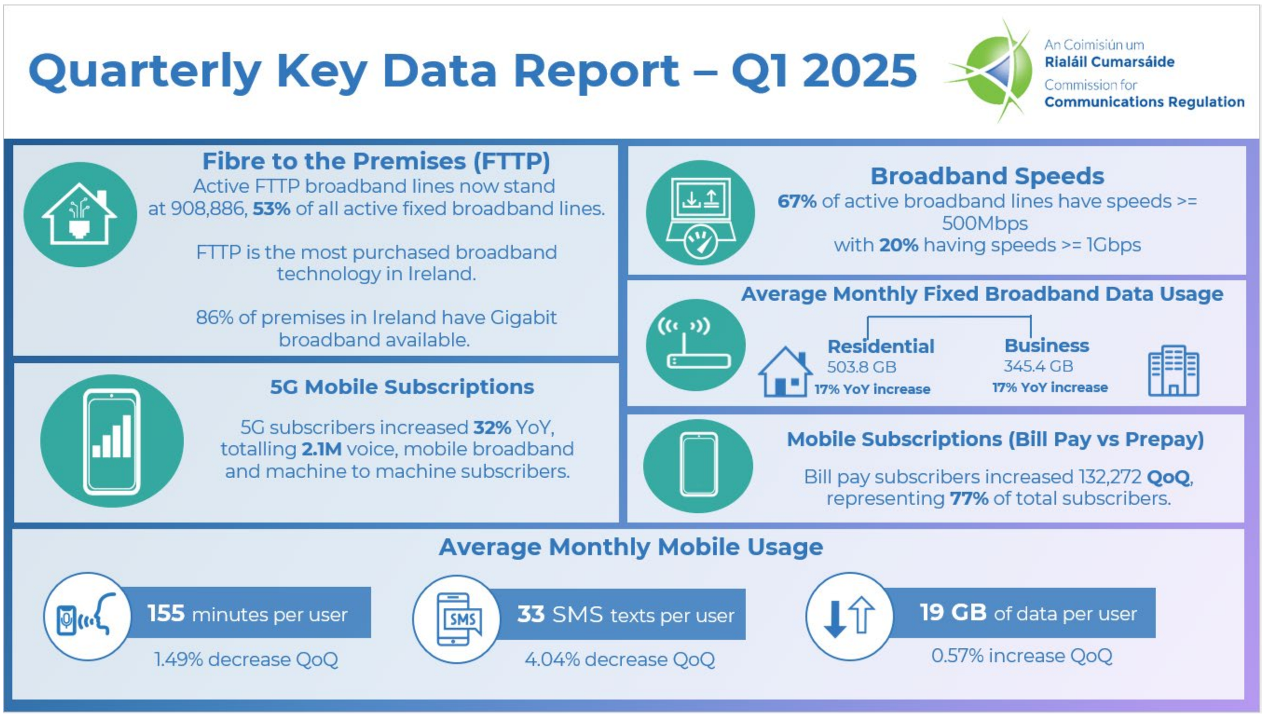
1 Q1 2025 Infographic



2. Overview of Irish Communications Market Q1 2025

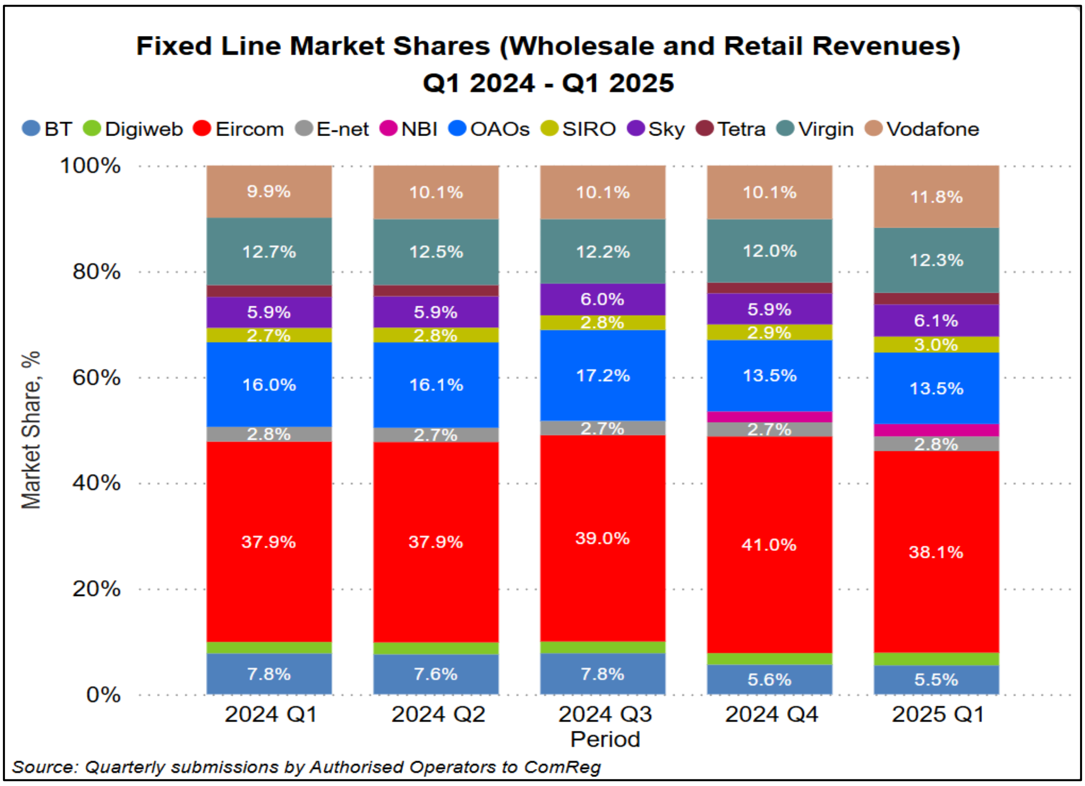
Table 1 - Communications Summary

Revenues	**2023 Q1**	**2023 Q2**	**2023 Q3**	**2023 Q4**	**2024 Q1**	**2024 Q2**	**2024 Q3**	**2024 Q4**	**2025 Q1**
Total Retail Market Revenues (000s)	€888,555	€913,381	€917,063	€952,941	€912,865	€924,569	€928,068	€929,204	€906,255
Total Fixed Line Wholesale Revenues (000's)	€153,142	€152,744	€156,350	€168,203	€158,370	€159,363	€158,251	€165,591	€150,117
Total Mobile Wholesale revenues (000's)	€32,471	€35,547	€37,108	€35,177	€29,785	€31,975	€30,629	€30,654	€29,631
Total FTTP and Cable Coverage	**2023 Q1**	**2023 Q2**	**2023 Q3**	**2023 Q4**	**2024 Q1**	**2024 Q2**	**2024 Q3**	**2024 Q4**	**2025 Q1**
Percentage Premises with FTTP Broadband Available (Measured by Eirc	55%	57%	60%	63%	65%	68%	71%	74%	76%
Percentage Premises with Gigabit Broadband (FTTP or Cable) Available (	71%	73%	75%	77%	78%	81%	83%	85%	86%
FTTP and Cable Take Up Rate	**2023 Q1**	**2023 Q2**	**2023 Q3**	**2023 Q4**	**2024 Q1**	**2024 Q2**	**2024 Q3**	**2024 Q4**	**2025 Q1**
FTTP Take Up Rate (Measured by Unique Eircodes)	41%	42%	43%	44%	46%	47%	48%	49%	50%
FTTP & Cable Take Up Rate (Measured by Unique Eircodes)	52%	53%	54%	55%	55%	56%	57%	57%	58%
Subscriber Lines	**2023 Q1**	**2023 Q2**	**2023 Q3**	**2023 Q4**	**2024 Q1**	**2024 Q2**	**2024 Q3**	**2024 Q4**	**2025 Q1**
Total Fixed Broadband Subscriber Lines	1,614,370	1,620,723	1,639,332	1,657,246	1,661,534	1,672,278	1,683,200	1,697,495	1,705,724
Total Fixed Voice (PSTN, ISDN and VOIP) Subscriber lines	1,234,534	1,235,496	1,207,702	1,176,856	1,143,676	1,117,763	1,105,730	1,078,038	1,051,412
Mobile Subscriptions inc. MBB and M2M - Total	9,057,782	9,292,295	9,532,420	9,733,587	9,848,149	9,995,748	10,145,572	10,295,164	10,418,806
Machine to Machine (M2M) Subscriptions	3,056,326	3,249,528	3,411,242	3,593,307	3,683,536	3,785,067	3,871,056	3,984,713	4,073,487
Mobile Broadband Subscriptions	383,919	382,797	383,896	382,500	385,099	383,270	394,408	391,262	393,913
Mobile Subscriptions exc. MBB and M2M - Total	5,617,537	5,659,970	5,737,282	5,757,780	5,779,514	5,827,411	5,880,108	5,919,189	5,951,406
Voice Traffic	**2023 Q1**	**2023 Q2**	**2023 Q3**	**2023 Q4**	**2024 Q1**	**2024 Q2**	**2024 Q3**	**2024 Q4**	**2025 Q1**
Total Voice Traffic Minutes (000s)	3,355,110	3,262,075	3,195,863	3,155,015	3,164,749	3,133,384	3,064,347	3,031,773	3,007,905
Total Fixed Voice Minutes (000's)	362,293	320,908	307,442	283,594	281,567	262,622	248,003	225,345	228,294
Total Mobile Voice Minutes (000's)	2,992,817	2,941,167	2,888,421	2,871,421	2,883,182	2,870,762	2,816,344	2,806,428	2,779,611

Fixed Market

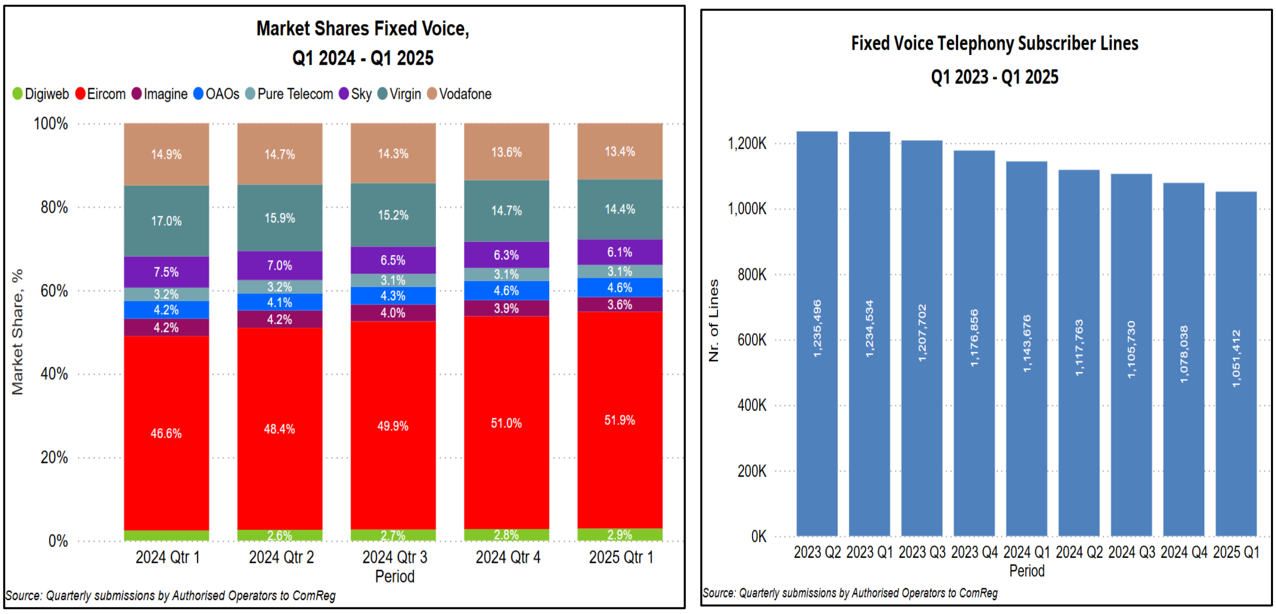
- In Q1 2025, Eir had the highest revenue share (retail and wholesale) in the fixed market at 38.1%.
- ComReg estimates that the next nine largest operators (Virgin Media Ireland, Vodafone (fixed only), Sky Ireland, BT Ireland, SIRO, E-Net, Digiweb, National Broadband Ireland and Tetra) contribute a further 48.4% share of total industry revenue.
- Remaining other authorised operators (OAOs) account for the residual 13.5% share.

Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Figure 2 – Retail Fixed Voice Subscriber Lines



- Fixed voice traffic in Q1 2025 was around 228 million minutes, which was a 1% increase on Q4 2024 and a decrease of 19% since Q1 2025.

- At the end of Q1 2025, there were 1,051,412 fixed voice subscriber lines (a decrease of 2% since Q4 2024 and a decrease of 8% on Q1 2024).
- As of Q1 2025, Eir had 52% of all fixed voice subscriber lines followed by Virgin Media (14.4%), Vodafone (13.4%), Sky (6.1%), Imagine Telecommunications Limited (3.6%), Pure Telecom (3.1%) and Digiweb (2.9%). Other operators accounted for the remaining 4.6% of fixed voice subscriber lines.

3. Retail Broadband Market

At the end of March 2025, there were over 2 million active total Broadband subscriber lines in Ireland. This is a 0.5% increase from the previous quarter and a 2.6% increase on Q1 2024. Looking at total Fixed Broadband lines only, these increased by 0.48% since Q4 2024, with a 2.7% annual increase on Q1 2024.

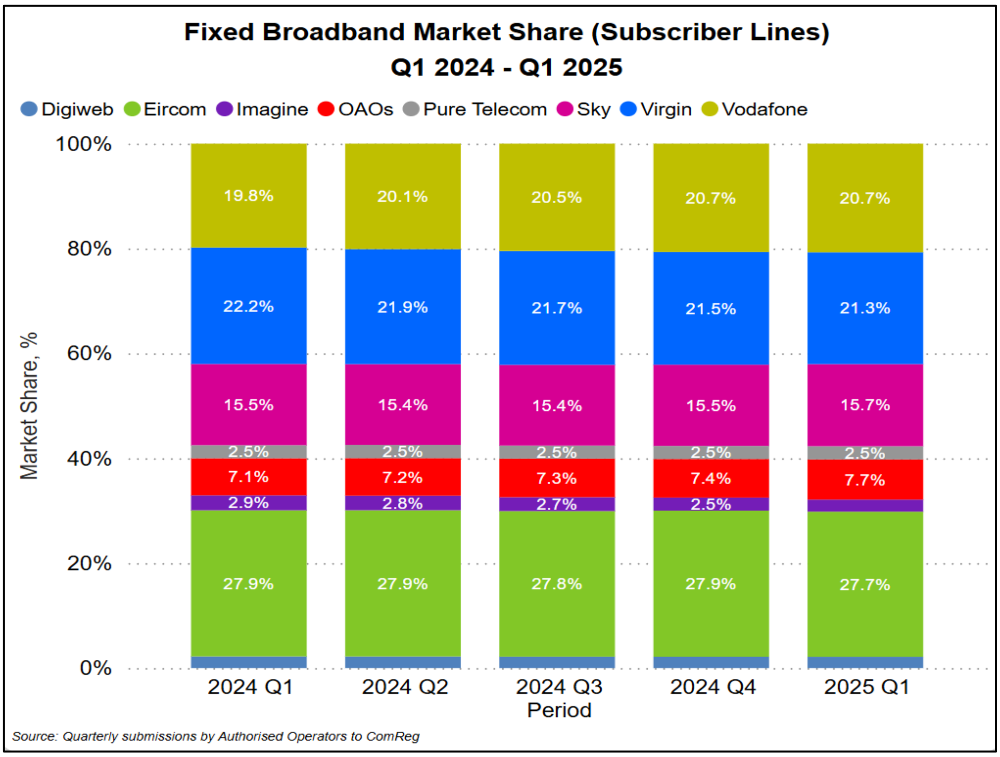
Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q1 2025	Quarterly Change Q4'24 – Q1'25	Annual Change Q1'24 – Q1'25
Cable Broadband	310,201	-2.59%	-9.08%
DSL Broadband	57,555	-7.76%	-27.85%
VDSL Broadband	334,795	-5.69%	-21.71%
FTTP Broadband	908,886	4.81%	27.54%
Satellite Broadband	16,385	14.52%	68.85%
FWA Broadband	77,902	-2.94%	-14.05%
Total Fixed Broadband	**1,705,724**	0.48%	2.66%
Mobile Broadband	393,913	0.68%	2.29%
Total Broadband	**2,099,637**	**0.51%**	**2.59%**

FTTP[1] (+4.8%), Satellite (+14.5%) and mobile broadband (+0.6%) broadband subscriber lines showed positive growth this quarter. VDSL (-5.6%), DSL (-7.7%), FWA[2] (-2.9%) and Cable (-2.5%) subscriber lines fell this quarter.

[1] Fibre to the Premises.
[2] Fixed Wireless Access.

Figure 3 – Retail Fixed Broadband Market Shares based on Subscriber Lines



- In Q1 2025, Eir had 27.7% of total retail fixed broadband subscriber lines, followed by Virgin Media at 21.3%, Vodafone at 20.7%, Sky Ireland at 15.7%, Imagine at 2.3%, Pure Telecom at 2.5% and Digiweb at 2.2%.

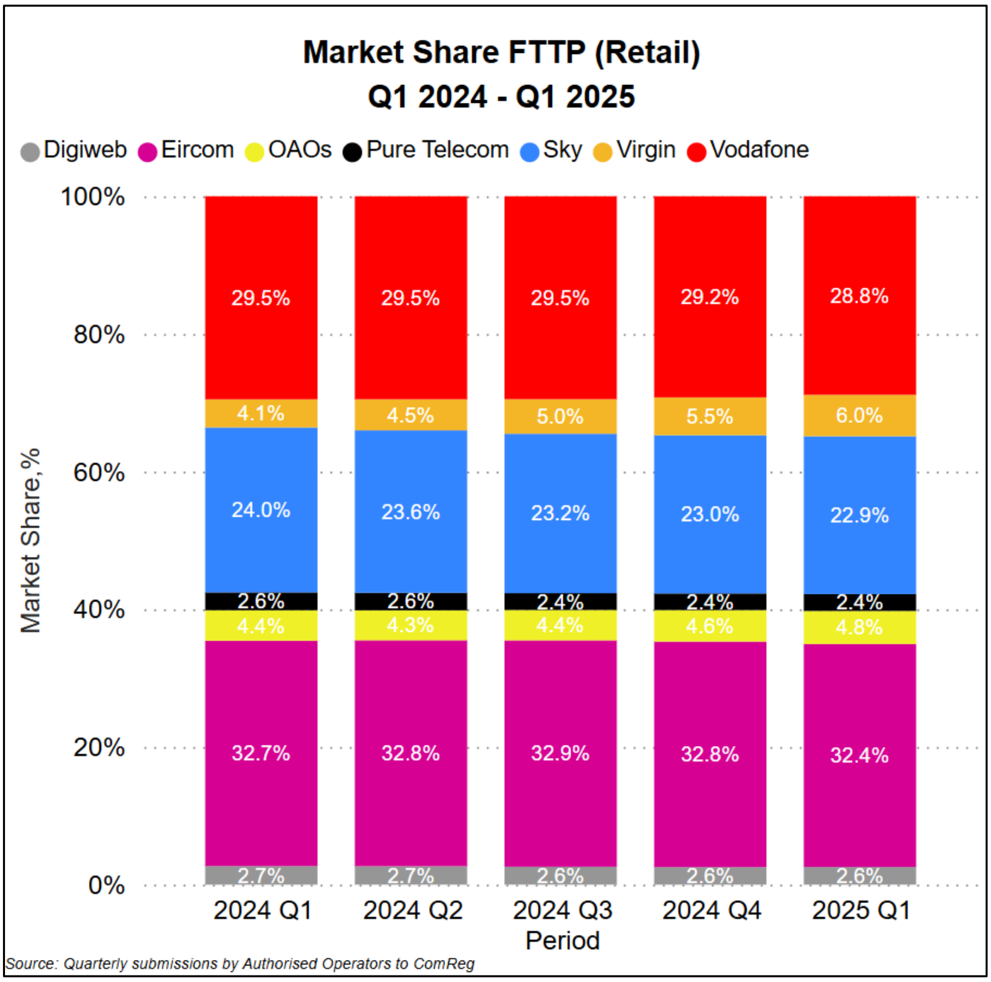
- All other authorised operators (OAOs) combined accounted for the remaining 7.6% share of retail fixed broadband subscriber lines.

Table 3 - Retail Fixed Broadband Subscriber Lines by Sold Download Speed

Fixed Broadband Subscriber Lines by Sold Speed	Q4 2024	Q1 2025	Quarterly Change
<2Mbps - 9.99Mbps	2.32%	2.18%	-0.15%
=10Mbps - 29.99Mbps	3.53%	3.29%	-0.24%
=30Mbps - 99.99Mbps	20.83%	19.59%	-1.24%
=100Mbps - 499.99Mbps	7.80%	7.87%	-0.08%
=500Mbps - 999.99Mbps	47.40%	47.36%	-0.04%
>=1GB	18.12%	19.71%	1.59%

- In Q1 2025, 74.9% of all fixed broadband subscriber lines had sold download speeds which were equal to or greater than 100Mbps, with 67.0% having sold download speeds equal to or greater than 500Mbps, a 1.5% quarter on quarter increase. Those having sold download speeds equal to or greater than 1GB increased by 1.59% quarter on quarter and stood at 19.71%.

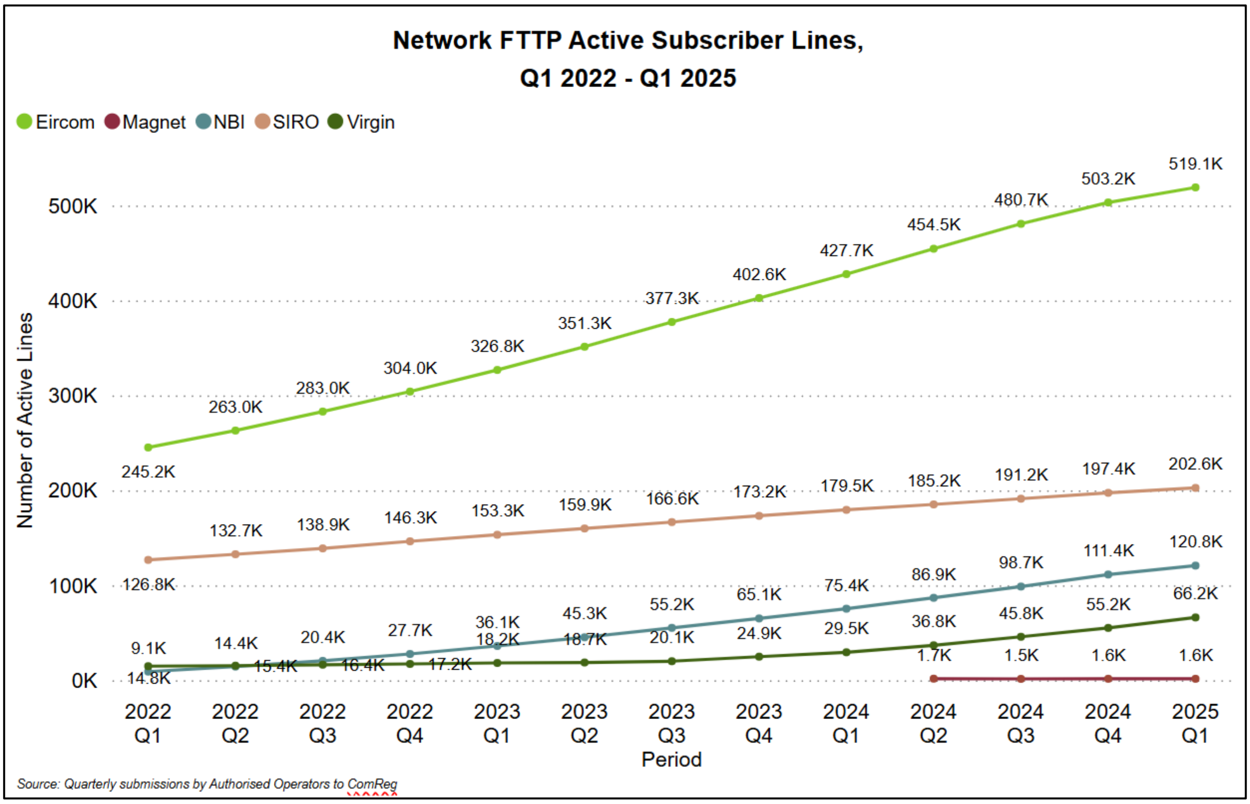
Figure 4 - FTTP Subscriber Line Market Share



- In Q1 2025, Eircom had 32.4% of retail Fibre to the Premises (FTTP) subscriber lines, followed by Vodafone at 28.8%, Sky Ireland at 22.9%, Virgin Media at 6.0%, Digiweb at 2.6% and Pure Telecom at 2.4%. Other operators accounted for the remaining 4.8%.

4. Broadband Market - Networks

Figure 5 – Network FTTP Active Subscriber Lines by Quarter



- In Q1 2025, based on the underlying network, 519k (up 3% QoQ) of the active FTTP subscriber lines were sold on the Eircom network, 202k (up 3% QoQ) were on the Siro network, 120k (up 8% QoQ) were on the NBI network, 66k (up 20% QoQ) were on the Virgin Media network and 1.5k were on the Magnet Network[3].

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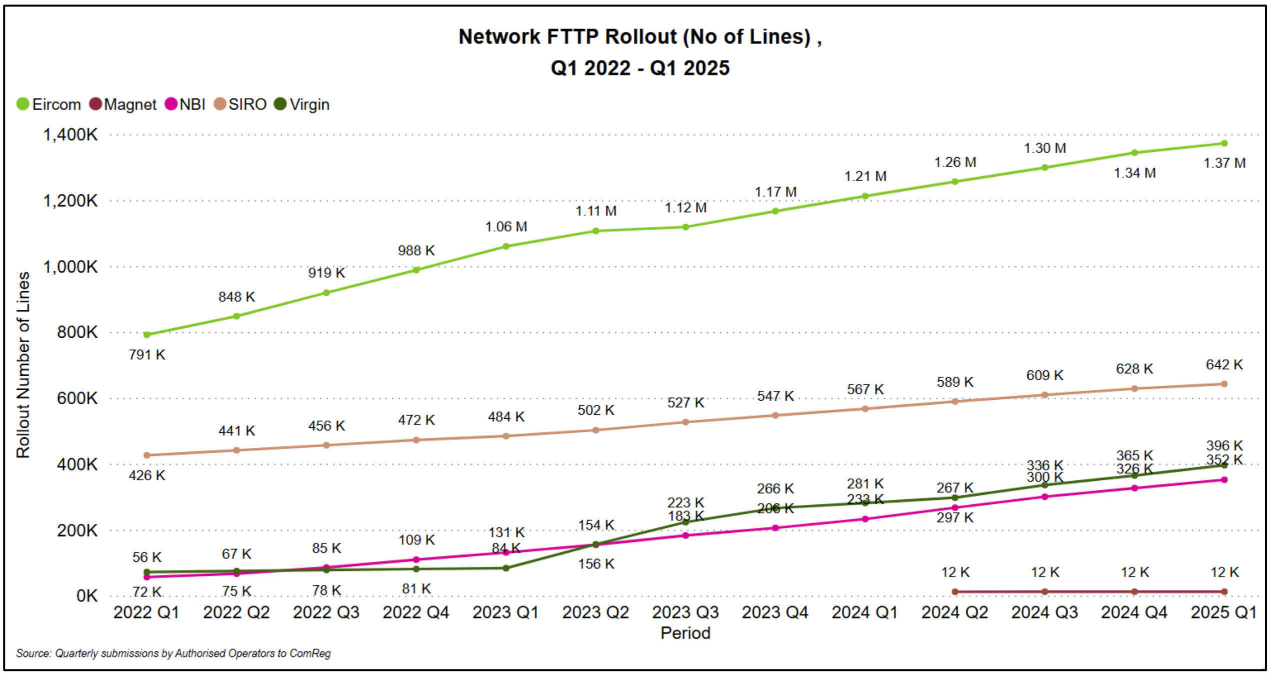
[3] Magnet began reporting Network FTTP lines in Q2 2024, the number of lines at the end of Q2 would be broadly similar to the lines present in the previous years.

Figure 6 – Network FTTP Broadband Rollout (No. of Lines) by Quarter



- In Q1 2025, Eircom reported having rolled out 1.37m (up 2% QoQ) FTTP broadband lines[4], followed by Siro with 642k (up 2% QoQ), Virgin Media Ireland with 395k (up 9% QoQ), NBI with 351k (up 8% QoQ), with Magnet having rolled out 12k[5] lines and Crossan 63 lines.

Total Gigabit (FTTP and Cable) Coverage

- 76% (up 2 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland[6] had FTTP broadband available at the end of Q1 2025.
- 86% (up 1 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland had Gigabit broadband available at the end of Q1 2025.
- The maps set out below show County level 'FTTP' and 'Gigabit' Coverage for Q1 2025.
- The Counties with the highest level of FTTP coverage are Laois, Longford and Westmeath at 92%, Westmeath has the highest level of Gigabit coverage at 94%.

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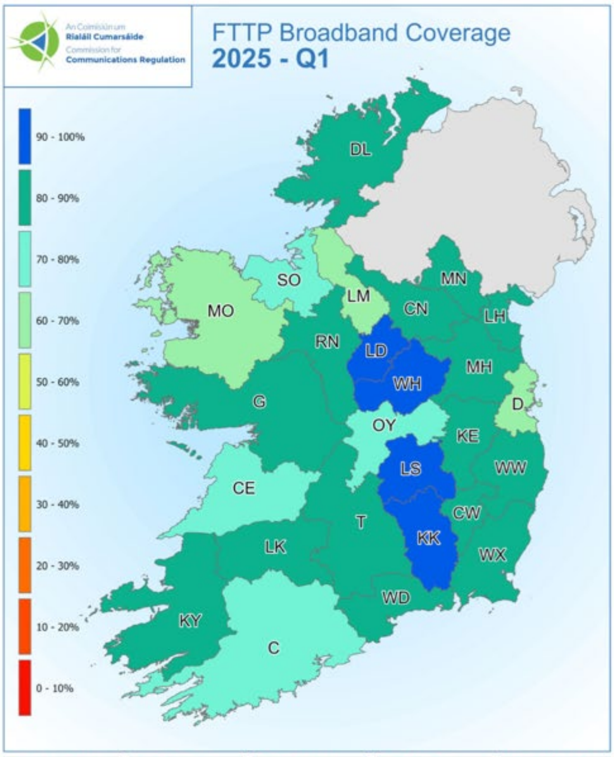
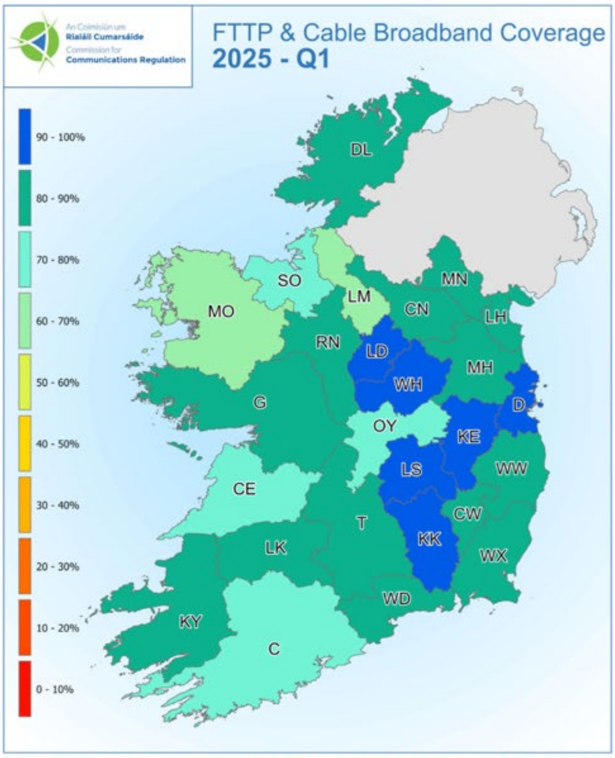
[4] The Network Operators Eircom, NBI, SIRO, Virgin Media, Magnet and Crossan each provide information on total FTTP broadband lines rolled out. This metric is based on the total number of FTTP lines, with a premises potentially having more than one FTTP broadband line. For example, a business premises may have multiple FTTP broadband lines. Individual Network Operators may also have FTTP broadband lines at the same premises. Therefore, adding the operators figures together does not indicate unique premises coverage. This coverage is captured as part of the Total FTTP and Cable Coverage.

[5] Magnet began reporting Network FTTP lines in Q2 2024, the number of lines at the end of Q2 would be broadly similar to the lines present in previous years.

[6] Each Network Operator provides a list of Eircodes associated with each broadband line. ComReg combines all Eircodes and derives a unique coverage figure for each premises by removing instances where Eircodes are passed by more than one network. Each premises (Eircode) which has FTTP and/or Cable is only counted once regardless of how many lines are present at the premises (Eircode). This total premises (Eircodes) passed figure is then divided by the total Eircodes for Ireland, which is taken from the 'Postal Address' field of the Eircode database.



Code	County	Code	County	Code	County	Code	County	Code	County
C	Cork	G	Galway	LK	Limerick	OY	Offaly	WW	Wicklow
CE	Clare	KE	Kildare	LM	Leitrim	RN	Roscommon	WX	Wexford
CN	Cavan	KK	Kilkenny	LS	Laois	SO	Sligo		
CW	Carlow	KY	Kerry	MH	Meath	T	Tipperary		
D	Dublin	LD	Longford	MN	Monaghan	WD	Waterford		
DL	Donegal	LH	Louth	MO	Mayo	WH	Westmeath		



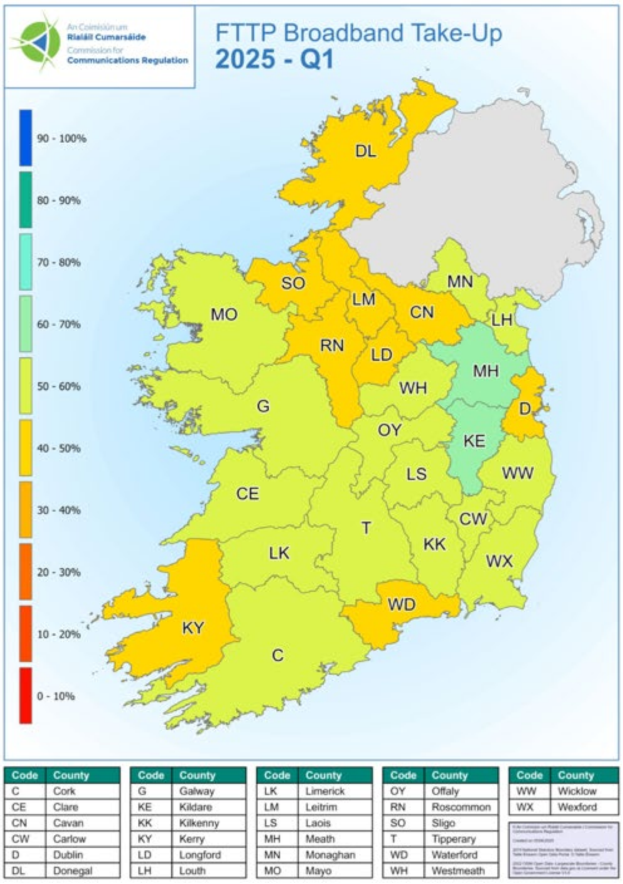
Code	County	Code	County	Code	County	Code	County	Code	County
C	Cork	G	Galway	LK	Limerick	OY	Offaly	WW	Wicklow
CE	Clare	KE	Kildare	LM	Leitrim	RN	Roscommon	WX	Wexford
CN	Cavan	KK	Kilkenny	LS	Laois	SO	Sligo		
CW	Carlow	KY	Kerry	MH	Meath	T	Tipperary		
D	Dublin	LD	Longford	MN	Monaghan	WD	Waterford		
DL	Donegal	LH	Louth	MO	Mayo	WH	Westmeath		

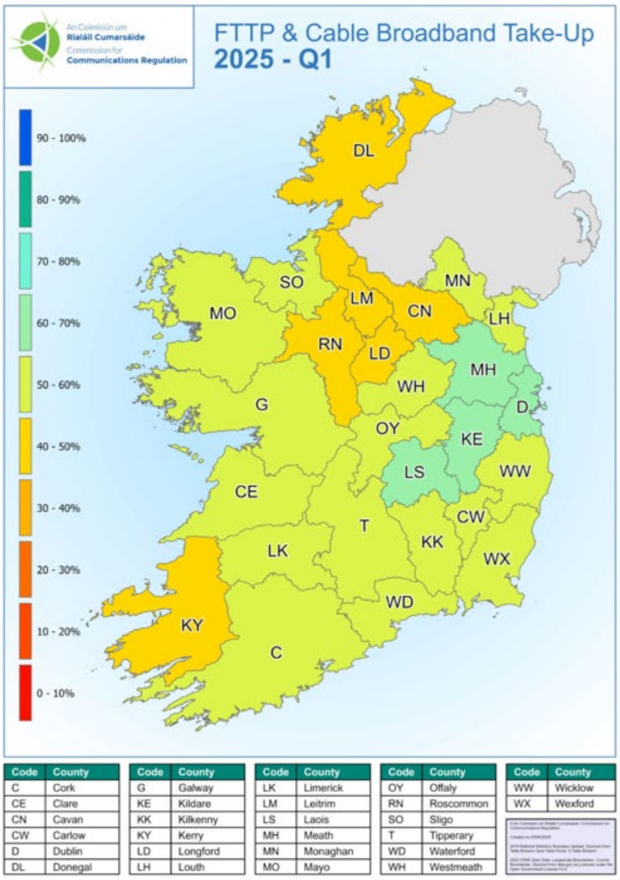
- Leitrim has the fastest growing FTTP coverage within the last year, with a 33-percentage point increase in FTTP coverage compared to Q1 2024.
- Westmeath has the fastest growing FTTP coverage since the last quarter, with a 4-percentage point increase in FTTP coverage compared to Q4 2024.

Total Gigabit (FTTP and Cable) Take-Up[7]

- In terms of FTTP take-up (active FTTP broadband premises divided by premises where FTTP is available), 50% (up by 1 percentage point QoQ) of all premises with FTTP broadband available had an active FTTP service at the end of Q1 2025.
- 58% (up by 1 percentage point QoQ) of premises with FTTP or Cable available had an active FTTP or Cable service at the end of Q1 2025.
- The maps set out below show County level 'FTTP' and 'Gigabit' take-up rate by County for Q1 2025.
- The County with the highest level of FTTP take-up is Meath at 62%. Waterford has the fastest growing FTTP take-up rate within the last year, with a 9-percentage point increase in take-up compared to Q1 2024.

[7] This metric is based on the total number of active FTTP premises where a unique active figure is derived for each premises (as measured by Eircodes). This removes instances where a single premises (e.g. a business) has multiple lines at the premises. This active FTTP premises figure is then divided by the total unique premises passed figure as calculated under 'Total FTTP and Cable Coverage'.



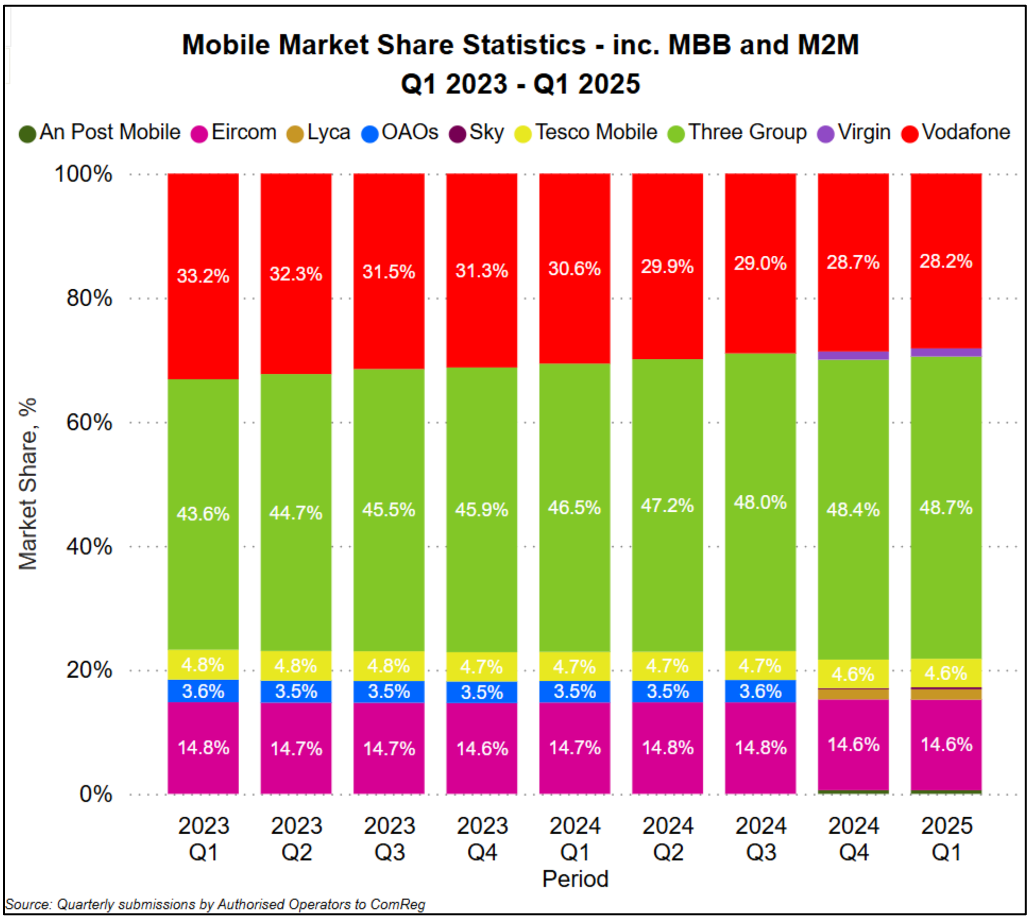


- Full tabular data and map visualisations for ‘FTTP’ and ‘Gigabit’ Coverage and Take-Up statistics by County by Quarter can be found at ComReg’s [Open Data Map Hub].

5. Mobile Market

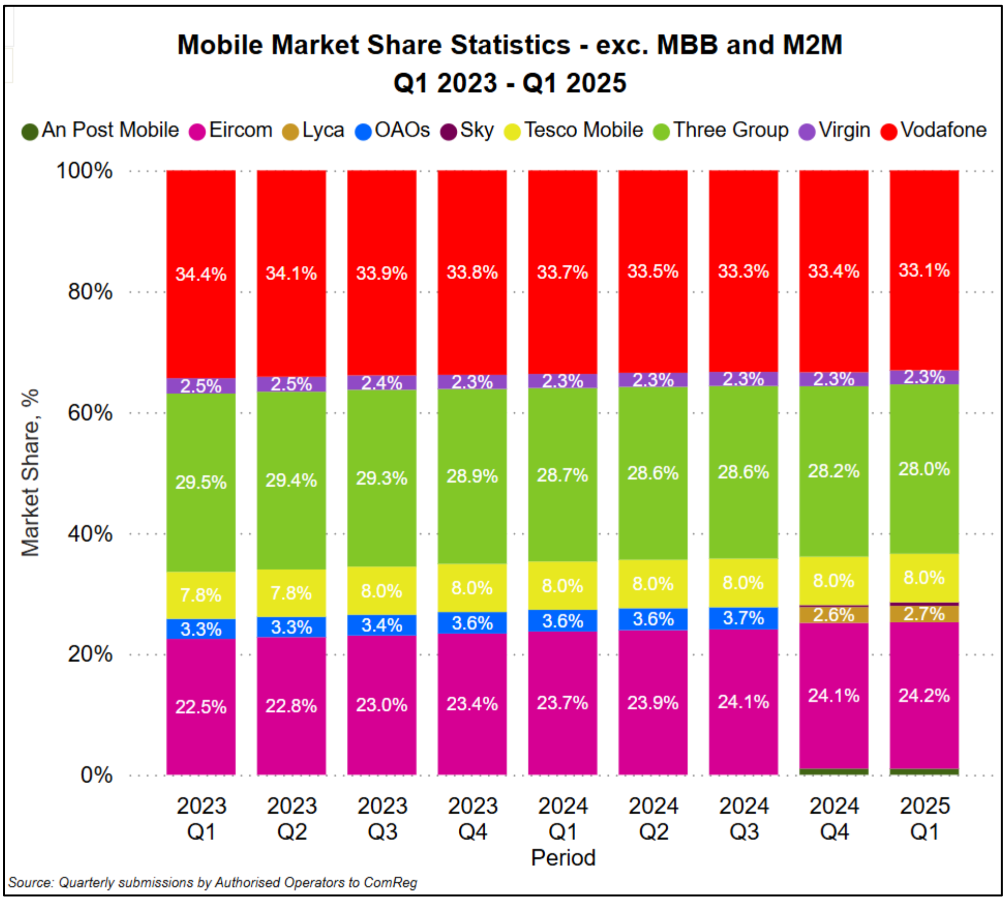
At the end of Q1 2025 there were 10,418,806 mobile subscriptions in Ireland, including mobile broadband ('MBB') and Machine to Machine ('M2M'). If mobile broadband subscriptions (393,913) and M2M subscriptions (4,073,487) are excluded, the total number of mobile voice subscriptions was 5,951,406.

Figure 7 - Market Shares by Subscription including Mobile Broadband and Machine to Machine



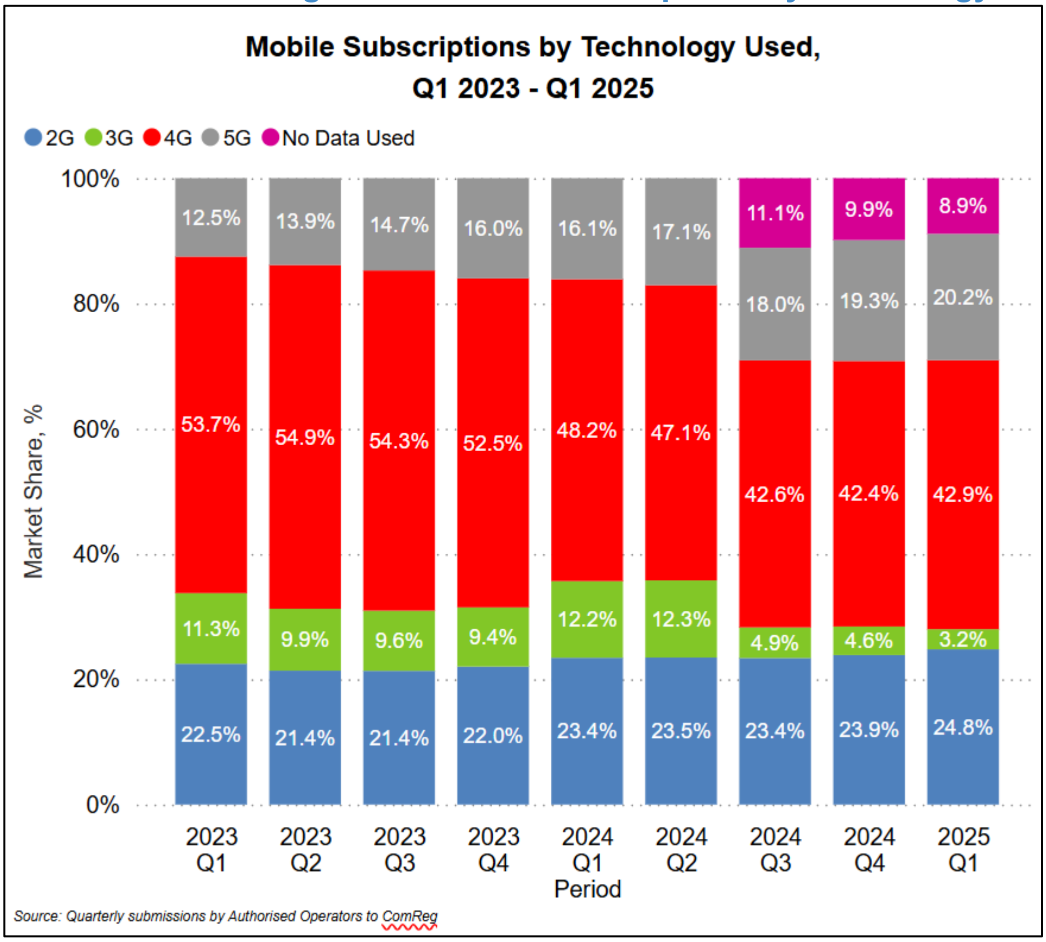
- In Q1 2025 Three had the largest share of mobile subscriptions including MBB and M2M at 48.7%. This was followed by Vodafone with 28.2%, Eir with 14.6%, Tesco Mobile at 4.6%, Lyca Mobile at 1.7%, Virgin Mobile at 1.3%, An Post Mobile at 0.6% and Sky Mobile at 0.3%.

Figure 8 - Market Shares by Subscription excluding Mobile Broadband and Machine to Machine



- In Q1 2025 Vodafone had the highest market share excluding mobile broadband and M2M (33.1%), followed by Three (28.0%), Eir (24.2%), Tesco Mobile (8.0%), Lyca (2.7%), Virgin Mobile (2.3%) and other operators (1.7%).

Figure 9 – Mobile Subscriptions by Technology



- There were 2,582,979 2G (24.79 %), 333,998 3G (3.21%), 4,473,600 4G (42.94%) and 2,103,305 5G (20.1%) mobile subscriptions in Q1 2025. 924,924 (8.9%) mobile subscriptions did not record any use of data in Q1 2025.

6. Corrigenda and Notes to Q4 2024

Note 1: Three Ireland revised VOIP minutes for Q4 2024.

Note 2: Virgin Media revised mobile porting volumes for Q4 2024.

Note 3: Lyca Mobile revised revenues for Mobile Voice Connection, Rental and Call Revenue (Domestic and International) for Q4 2024.

Note 4: Vodafone revised Roaming Data Traffic (GB) for Q4 2024.

7. Appendix 1: Legal Disclaimer

The information and statistics contained within this document are derived from a variety of sources, but it is mostly reliant on data obtained from authorised operators.

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