



An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q2 2025

Information Notice

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An Coimisiún um Rialáil Cumarsáide
Commission for Communications Regulation

1 Lárcheantar na nDugaí, Sráid na nGildeanna, BÁC 1, Éire, D01 E4X0.
One Dockland Central, Guild Street, Dublin 1, Ireland, D01 E4X0.
Teil | Tel +353 1 804 9600 Suíomh | Web www.comreg.ie

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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.

Map visualisations for 'FTTP' and 'Gigabit' Coverage and Take-Up statistics by County, Local Electoral Area, Electoral Division and other Geographic units can be found at ComReg's [Open Data Map Hub](#)

Data presented in this Summary of the Quarterly Key Data is based on questionnaires completed by certain authorised operators for the period from 1st April 2025 to 30th June 2025. The report is based on submissions from 54 active operators.

The report contains the following key charts/data:


- Overview of Markets
 - Table 1 – Communications Summary
- Fixed Markets
 - Figure 1 – Fixed Line Market Shares based on Wholesale and Retail Revenue
- Fixed Voice
 - Figure 2 – Retail Fixed Voice Subscriber lines
- Retail Broadband Market
 - Table 2 – Total Number of Active Subscriber Broadband Lines
 - Figure 3 – Retail Fixed Broadband Market Shares based on Subscriber Lines
 - Table 3 – Retail Fixed Broadband Subscriber Lines by Sold Download Speed
 - Figure 4 – Retail FTTP Subscriber Lines Market Shares
- Broadband Market - Networks
 - Figure 5 – Network FTTP Active Subscriber Lines by Quarter
 - Figure 6 - Network FTTP Lines Broadband Rollout (No of Lines)
- Mobile Market
 - Figure 8 – Retail Market Shares by Subscription including Mobile Broadband (MBB) and Machine to Machine (M2M)
 - Figure 9 – Retail Market Shares by Subscription excluding Mobile Broadband (MBB) and Machine to Machine (M2M)
- Revisions
- Appendix

1 Q2 2025 Infographic

QUARTERLY KEY DATA REPORT – Q2 2025




FIBRE TO THE PREMISES (FTTP)



78%


% premises that have FTTP broadband available



56%


% of active broadband lines that are FTTP broadband

BROADBAND SPEEDS



69%


% of active broadband lines with speeds \geq 500Mbps



21%

% of active broadband lines with speeds \geq 1Gbps

GIGABIT BROADBAND COVERAGE (FTTP AND CABLE)




88%

% of premises in Ireland that have Gigabit broadband available


Source: ComReg Quarterly Key Data Report Q2 2025

MOBILE STATISTICS

BILL PAY VS. PREPAY




77% of all mobile subscribers are bill pay



2.16 million 5G mobile voice, broadband and machine to machine subscribers

AVERAGE MONTHLY MOBILE USAGE



- 152 minutes per user
- 32 SMS texts per user
- 19.7 GB of data per user

2. Overview of Irish Communications Market Q2 2025

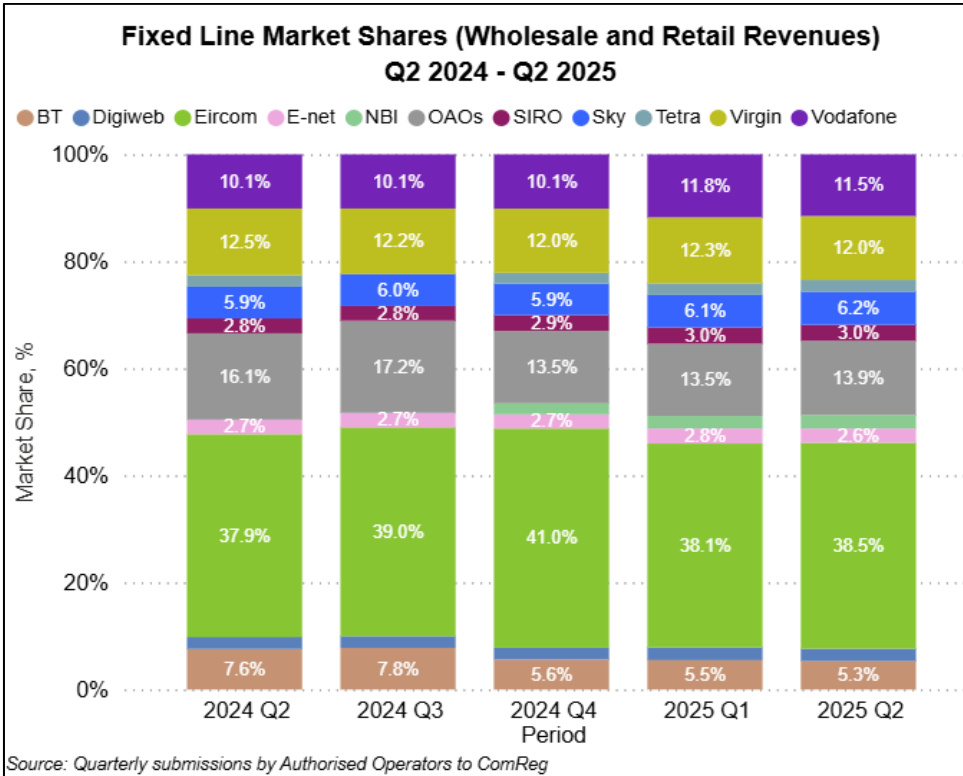
Table 1 - Communications Summary

Revenues	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2
Total Retail Market Revenues (000s)	€924,569	€928,068	€929,204	€906,255	€921,811
Total Fixed Line Wholesale Revenues (000's)	€159,363	€158,251	€165,591	€150,117	€151,734
Total Mobile Wholesale revenues (000's)	€31,975	€30,629	€30,654	€29,631	€30,108
Total FTTP and Cable Coverage (By Eircodes)	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2
Percentage Premises with FTTP Broadband Available	68.0%	71.0%	73.6%	75.7%	78.5%
Percentage Premises with Gigabit Broadband (FTTP or Cable) Available	81.0%	83.0%	84.6%	86.0%	87.7%
FTTP and Cable Take Up Rate	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2
FTTP Take Up Rate (Measured by Unique Eircodes)	46.7%	47.8%	48.8%	49.6%	50.2%
FTTP & Cable Take Up Rate (Measured by Unique Eircodes)	55.8%	56.5%	57.3%	57.9%	58.4%
Subscriber Lines	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2
Total Fixed Broadband Subscriber Lines	1,672,278	1,683,200	1,697,495	1,705,724	1,716,609
Total Fixed Voice (PSTN, ISDN and VOIP) Subscriber lines	1,117,763	1,105,730	1,078,038	1,051,412	1,032,148
Mobile Subscriptions inc. MBB and M2M - Total	9,995,748	10,145,572	10,295,164	10,418,806	10,561,301
Machine to Machine (M2M) Subscriptions	3,785,067	3,871,056	3,984,713	4,073,487	4,179,852
Mobile Broadband Subscriptions	383,270	394,408	391,262	393,913	393,253
Mobile Subscriptions exc. MBB and M2M - Total	5,827,411	5,880,108	5,919,189	5,951,406	5,988,196
Voice Traffic	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2
Total Voice Traffic Minutes (000s)	3,133,384	3,064,347	3,031,773	3,007,905	2,943,592
Total Fixed Voice Minutes (000's)	262,622	248,003	225,345	228,294	215,252
Total Mobile Voice Minutes (000's)	2,870,762	2,816,344	2,806,428	2,779,611	2,728,340

Fixed Market

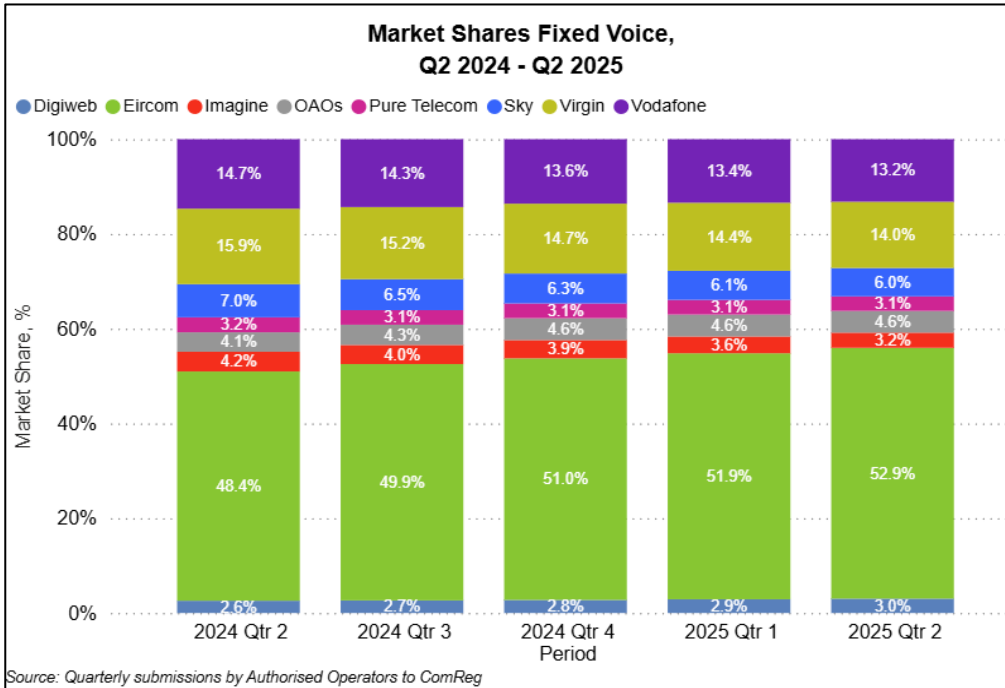
- In Q2 2025, Eir had the highest revenue share (retail and wholesale) in the fixed market at 38.5%.
- ComReg estimates that the next nine largest operators (Virgin Media Ireland, Vodafone (fixed only), Sky Ireland, BT Ireland, SIRO, E-Net, National Broadband Ireland, Digiweb and Tetra) contribute a further 47.6% share of total industry revenue.
- Remaining other authorised operators (OAOs) account for the residual 13.9% 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 Q2 2025 was approximately 215 million minutes, which was a 6% decrease on Q1 2025 and a decrease of 18% since Q2 2024.
- At the end of Q2 2025, there were 1,032,148 fixed voice subscriber lines, a decrease of 2% since Q1 2025 and a decrease of 8% since Q2 2024.
- As of Q2 2025, Eir had 52.9% of all fixed voice subscriber lines followed by Virgin Media (14.0%), Vodafone (13.2%), Sky Ireland (6.0%), Imagine Telecommunications Limited (3.2%), Pure Telecom (3.1%) and Digiweb (3.0%). Other operators accounted for the remaining 4.6% of fixed voice subscriber lines.

3. Retail Broadband Market

At the end of June 2025, there were over 2.1 million active total Broadband subscriber lines in Ireland. This is a 0.59% increase from the previous quarter and a 2.64% increase on Q2 2024. Looking at total Fixed Broadband lines only, these increased by 0.76% since Q1 2025, with a 2.65% annual increase on Q2 2024.

Table 2 - Total Number of Active Broadband Subscriber Lines

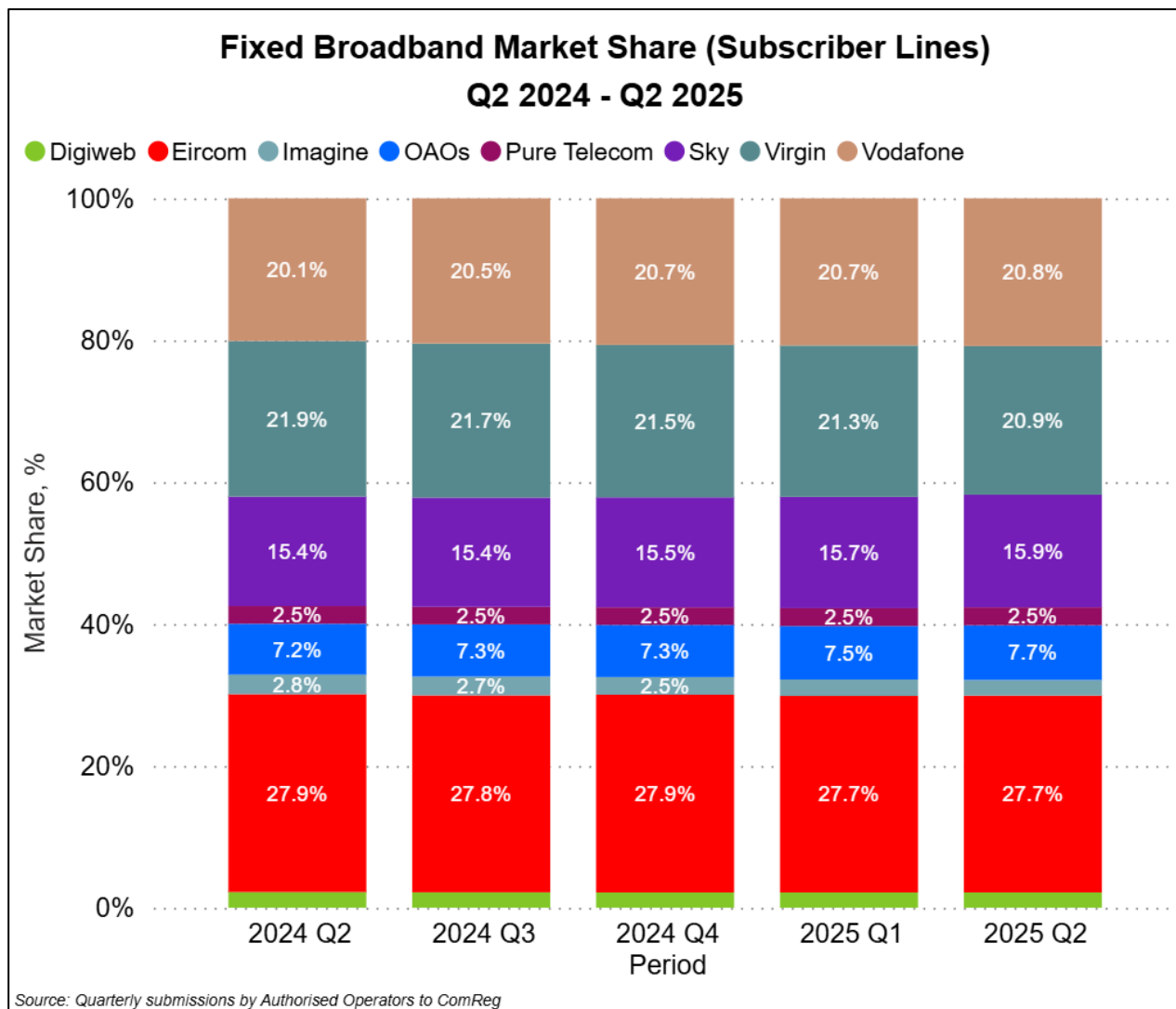
Line Type	Q2 2025	Quarterly Change Q1'25 – Q2'25	Annual Change Q2'24 – Q2'25
Cable Broadband	300,854	-3.01%	-9.86%
DSL Broadband	49,981	-7.59%	-30.93%
VDSL Broadband	317,947	-6.01%	-21.08%
FTTP Broadband	957,957	5.40%	25.44%
Satellite Broadband	19,877	21.31%	72.14%
FWA Broadband	69,993	-7.61%	-20.50%
Total Fixed Broadband	1,716,609	0.76%	2.65%
Mobile Broadband	393,253	-0.17%	2.60%
Total Broadband	2,109,862	0.59%	2.64%

FTTP¹ (+5.4%) and Satellite (+21.3%) broadband subscriber lines showed positive growth this quarter. VDSL (-6.0%), DSL (-7.6%), FWA² (-7.6%), Cable (-3.0%) and Mobile Broadband (-0.2%) 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

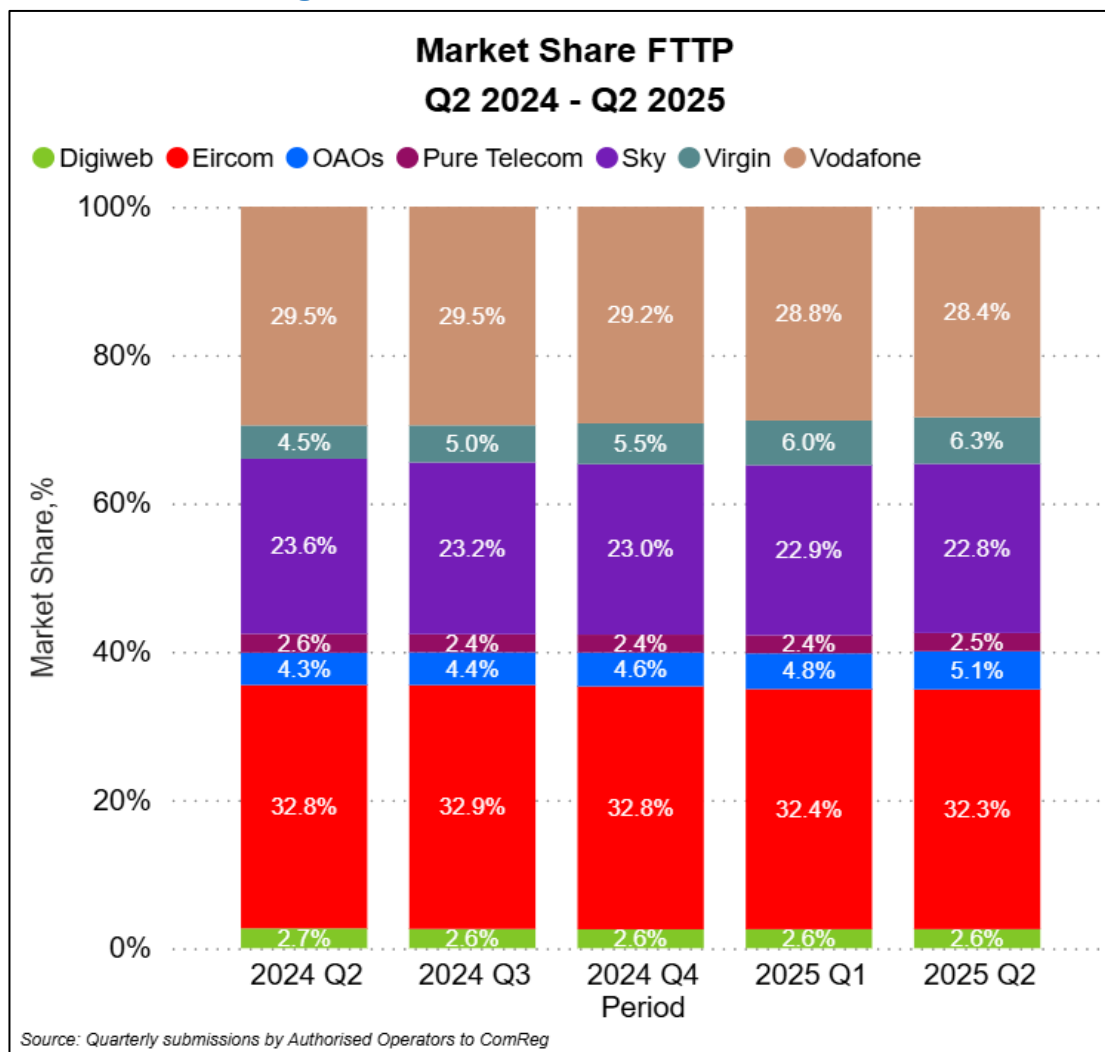


- In Q2 2025, Eir had 27.7% of total retail fixed broadband subscriber lines, followed by Virgin Media at 20.9%, Vodafone at 20.8%, Sky Ireland at 15.9%, Digiweb at 2.2%, Imagine Telecommunications Limited at 2.2% and Pure Telecom at 2.5%.
- All other authorised operators (OAOs) combined accounted for the remaining 7.7% 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	Q1 2025	Q2 2025	Quarterly Change
<2Mbps - 9.99Mbps	2.07%	1.91%	-0.16%
=10Mbps - 29.99Mbps	3.21%	2.97%	-0.24%
=30Mbps - 99.99Mbps	19.81%	18.55%	-1.26%
=100Mbps - 499.99Mbps	7.76%	7.74%	-0.02%
=500Mbps - 999.99Mbps	47.42%	47.72%	0.30%
>=1GB	19.73%	21.12%	1.39%

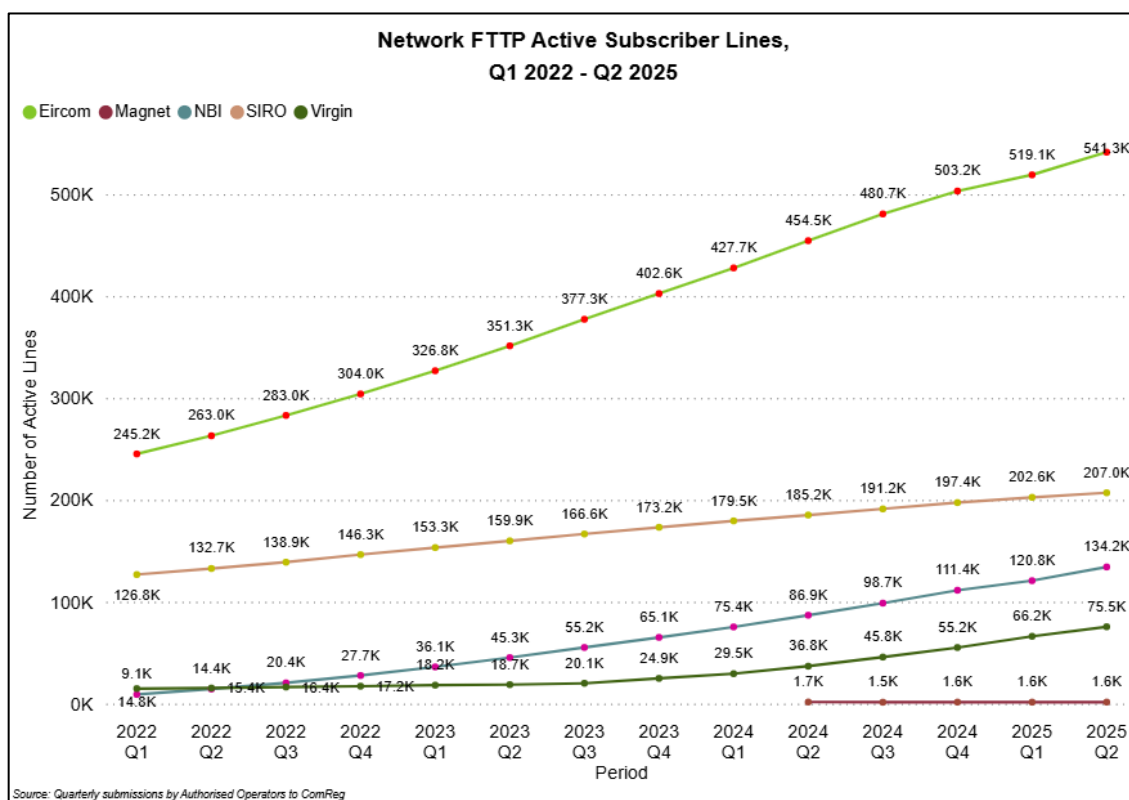
- In Q2 2025, 76.6% of all fixed broadband subscriber lines had sold download speeds which were equal to or greater than 100Mbps, with 68.8% having sold download speeds equal to or greater than 500Mbps, a 1.6 percentage point quarter on quarter increase. Those having sold download speeds equal to or greater than 1GB increased by 1.4 percentage point quarter on quarter and stood at 21.1%.

Figure 4 - FTTP Subscriber Line Market Share

- In Q2 2025, Eir had 32.3% of retail Fibre to the Premises (FTTP) subscriber lines, followed by Vodafone at 28.4%, Sky Ireland at 22.8%, Virgin Media at 6.3%, Digiweb at 2.6% and Pure Telecom at 2.5%. Other operators accounted for the remaining 5.1%.

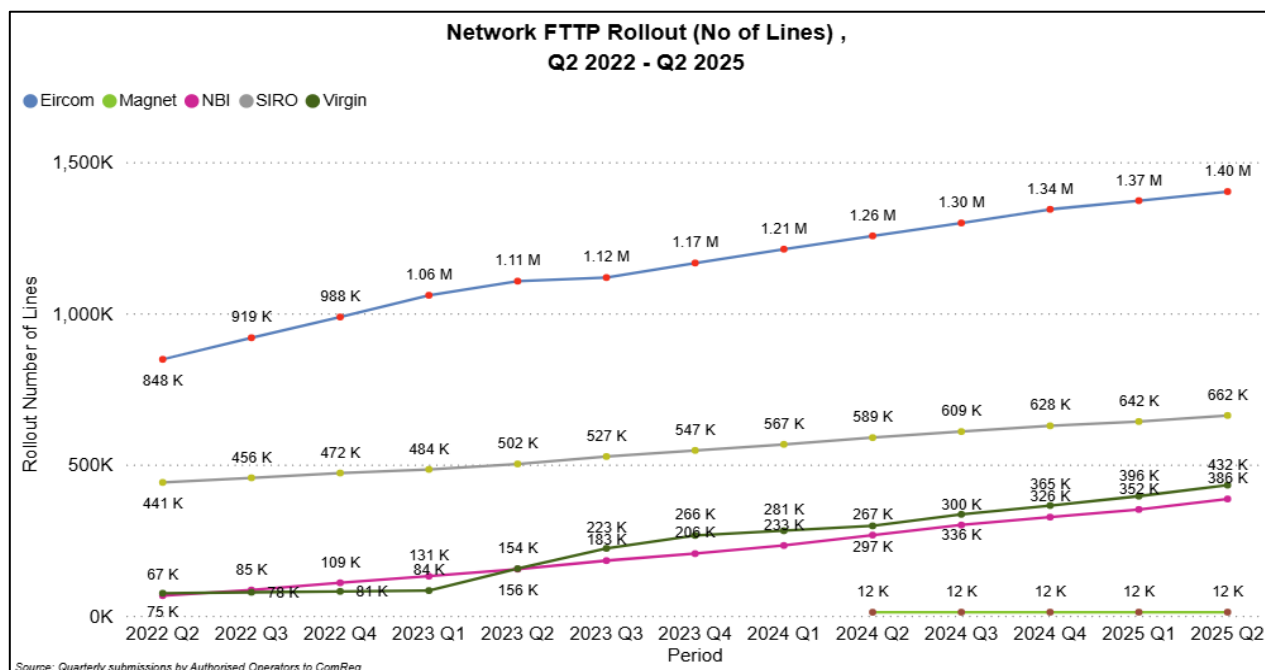
4. Broadband Market - Networks

Figure 5 – Network FTTP Active Subscriber Lines by Quarter



- In Q2 2025, based on the underlying network, 541k (up 4% QoQ) of the active FTTP subscriber lines were sold on the Eir network, 207k (up 2% QoQ) were on the Siro network, 134k (up 11% QoQ) were on the NBI network, 76k (up 14% QoQ) were on the Virgin Media network and 1.6k were on the Magnet Network³.

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 Q2 2025, Eir reported having rolled out 1.40m (up 2% QoQ) FTTP broadband lines⁴, followed by Siro with 662k (up 3% QoQ), Virgin Media Ireland with 432k (up 9% QoQ), NBI with 386k (up 10% QoQ), with Magnet having rolled out 12k⁵ lines and Crossan 63 lines.

Total Gigabit (FTTP and Cable) Coverage

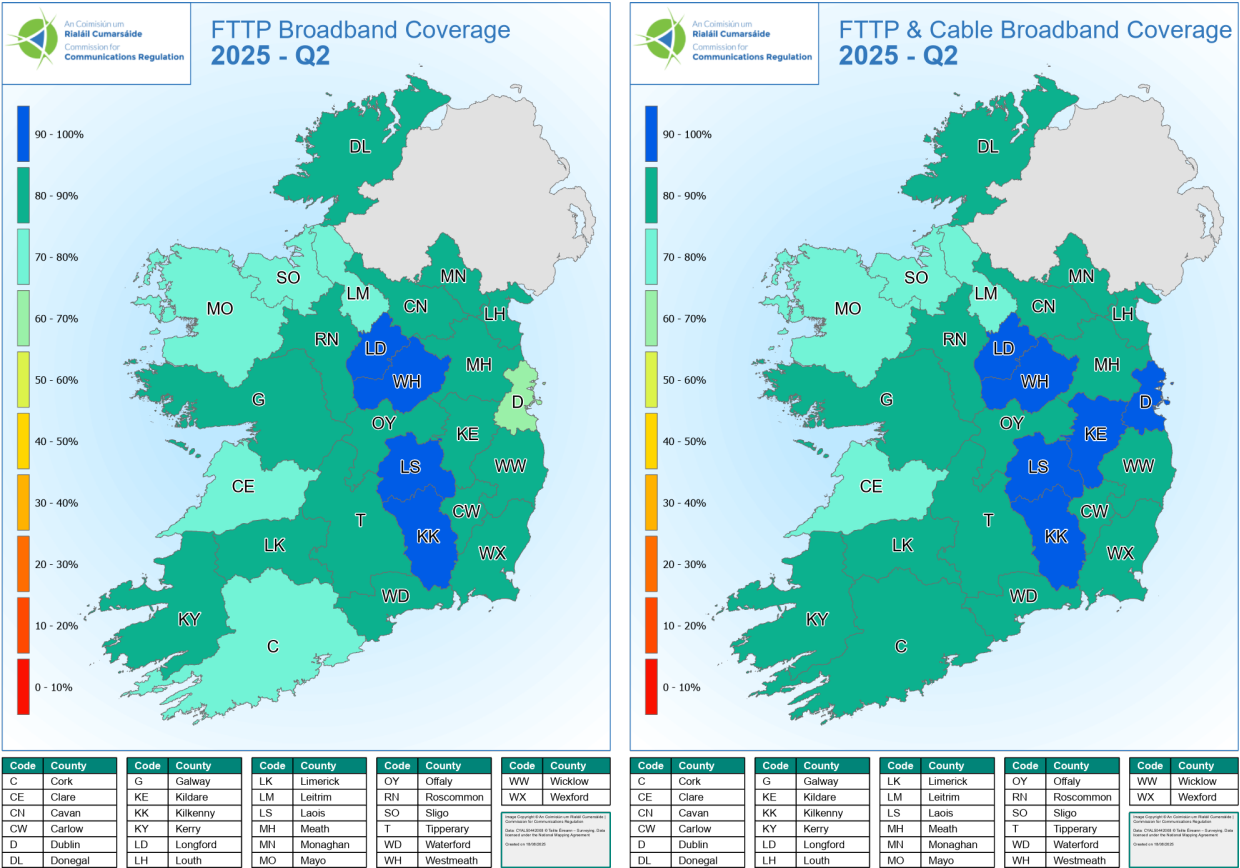
- Map visualisations for Gigabit Coverage and Take-Up statistics by County, Local Electoral Area, Electoral Division and other geographic units can be found at ComReg's [Open Data Map Hub](#).
- 78.5% (up 3 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland⁶ had FTTP broadband available at the end of Q2 2025.
- 87.7% (up 2 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland had Gigabit broadband available at the end of Q2 2025.

⁴ The Network Operators Eir, 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.

- The Counties with the highest level of FTTP coverage are Longford and Westmeath at 94%. Westmeath has the highest level of Gigabit coverage at 96%.
- Leitrim has the fastest growing FTTP coverage within the last year, with a 31-percentage point annual increase in FTTP coverage to now stand at 77% coverage.
- ComReg's [Open Data Map Hub](#) has been expanded to include additional geographic units including Local Electoral Area, Electoral Division and Small Area. For example, 90% of premises in the Electoral Division of Ballincollig in Cork had FTTP broadband available at the end of Q2 2025.

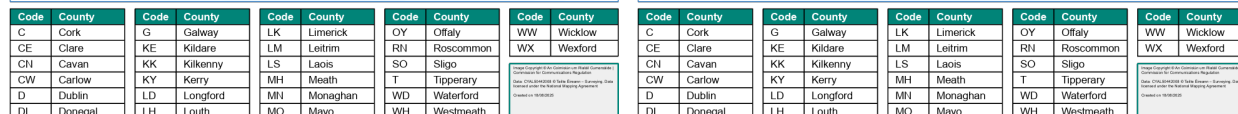


Total Gigabit (FTTP and Cable) Take-Up⁷

- In terms of FTTP take-up (active FTTP broadband premises divided by premises where FTTP is available), 50% of all premises with FTTP broadband available had an active FTTP service at the end of Q2 2025.

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'.

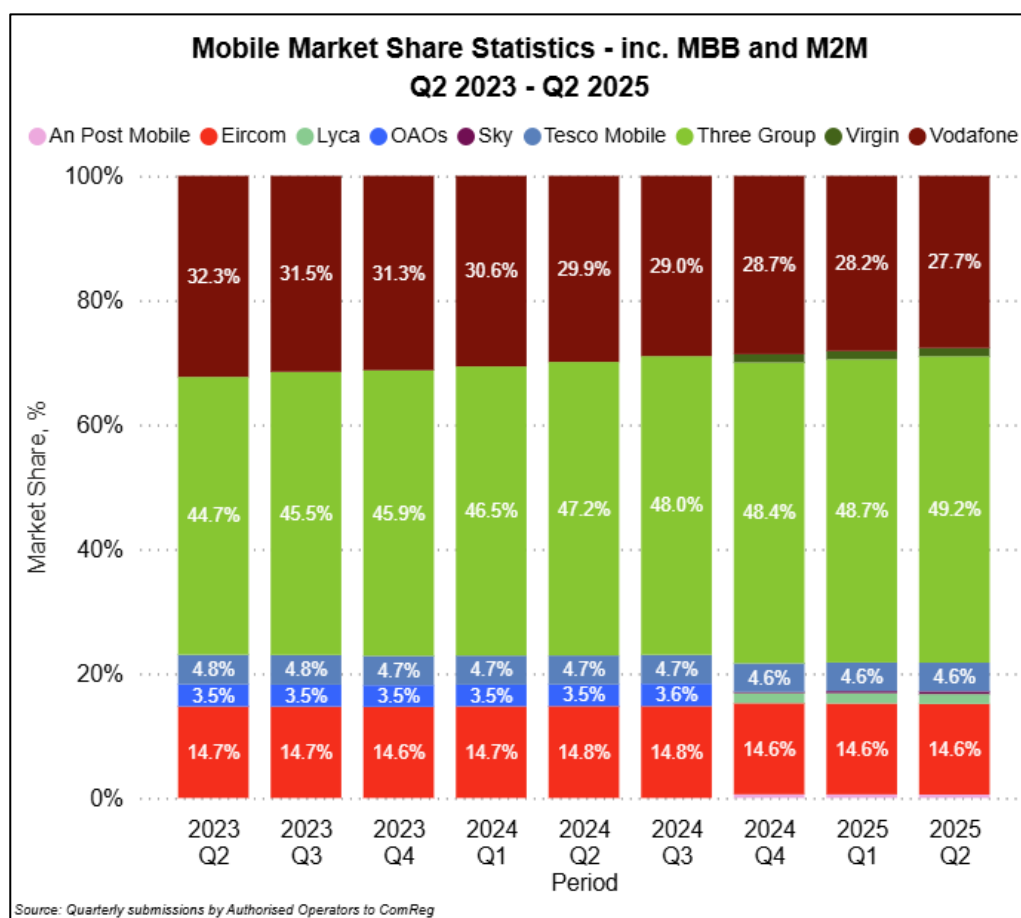
- See ComReg's [Open Data Map Hub](#) for further map visualisations on Gigabit broadband.



5. Mobile Market

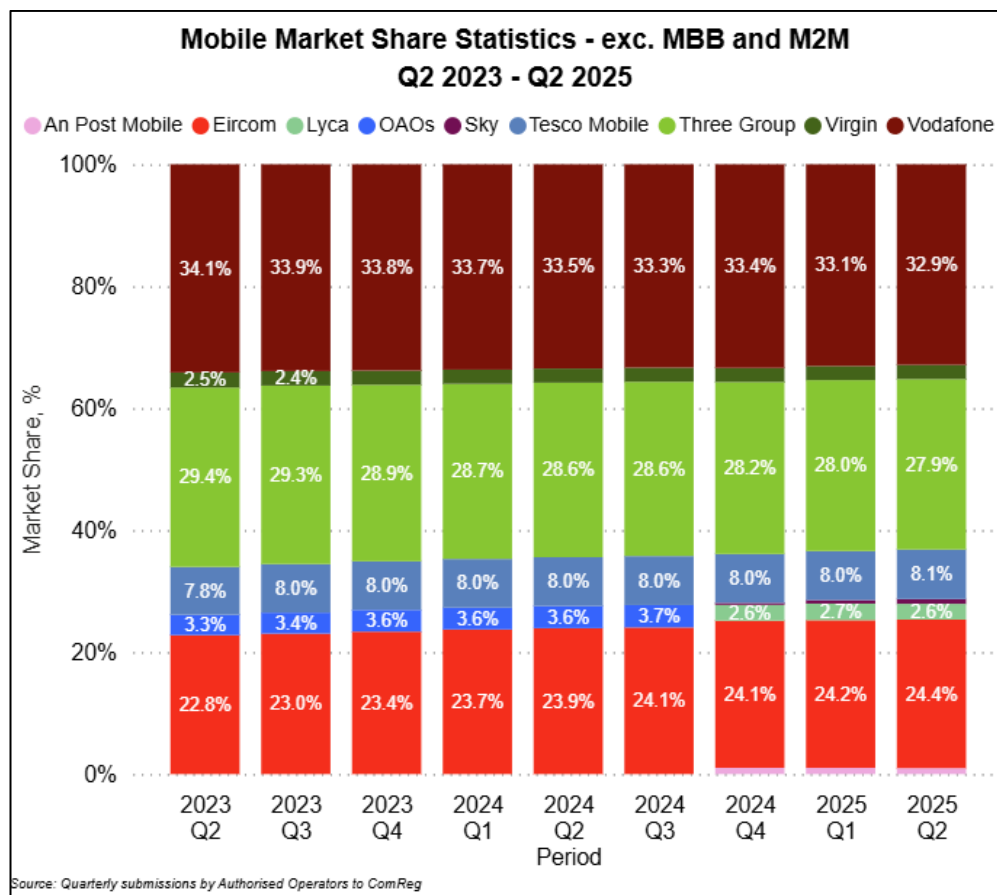
At the end of Q2 2025 there were 10,561,301 mobile subscriptions in Ireland, including mobile broadband (MBB) and Machine to Machine (M2M). If mobile broadband subscriptions (393,253) and M2M subscriptions (4,179,852) are excluded, the total number of mobile voice subscriptions was 5,988,196.

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

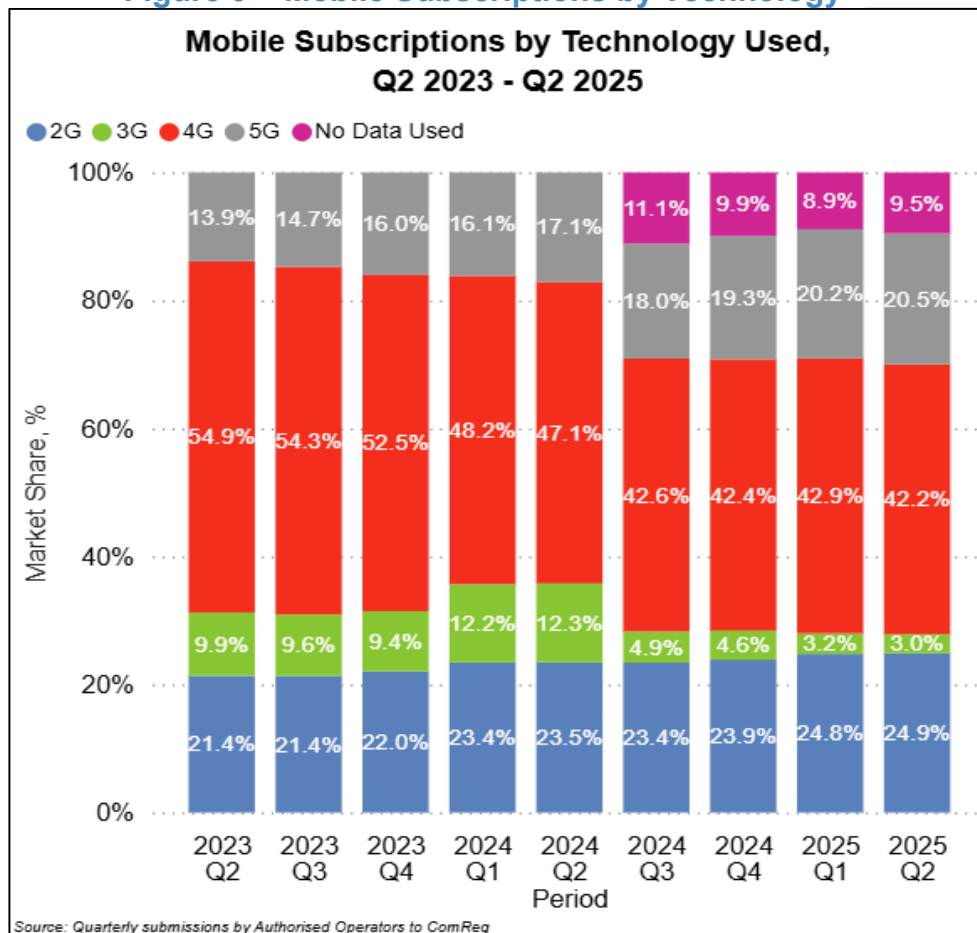


- In Q2 2025 Three had the largest share of mobile subscriptions including MBB and M2M at 49.2%. This was followed by Vodafone with 27.7%, Eir with 14.6%, Tesco Mobile at 4.6%, Lyca Mobile at 1.6%, Virgin Mobile at 1.3%, An Post Mobile at 0.6% and Sky Mobile at 0.4%.

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



- In Q2 2025 Vodafone had the highest market share excluding mobile broadband and M2M (32.9%), followed by Three (27.9%), Eir (24.4%), Tesco Mobile (8.1%), Lyca (2.6%), Virgin Mobile (2.3%) and other operators (1.8%).

Figure 9 – Mobile Subscriptions by Technology

- There were 2,629,193 2G (24.89%), 313,867 3G (2.97%), 4,451,712 4G (42.15%) and 2,160,513 5G (20.46%) mobile subscriptions in Q2 2025. 1,006,016 (9.5%) mobile subscriptions did not record any use of data in Q2 2025.

6. Revisions

Note 1: ESBT revised their total fixed investment for 2023.

Note 2: AirWire revised their total revenue for Q1 2025.

Note 3: Rural WiFi Fixed Wireless Access (FWA) lines revised for Q1 2025.

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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