The eir Digital Ireland Report.

How people, businesses and communities are connecting for a better Ireland today.

February 2026.

eir for all.

About eir.

eir is Ireland's largest telecommunications provider, with the most extensive mobile and fixed networks nationwide. We deliver high-speed broadband, mobile, voice, data, and TV services to over 2 million customers across residential, business, enterprise, and public sectors.

eir operates at retail, business and wholesale levels. We serve end users directly and enable other providers through access to our infrastructure – making us central and critical to Ireland's connectivity ecosystem.

With a fibre network that is available to more than 1.4 million homes and businesses across Ireland, and a 5G mobile network covering 99 percent of the population, eir is living its mission to connect for a better Ireland.

eir is a quad-play provider operating on an integrated network, delivering bundled mobile, broadband, TV, and voice services.

As of the end of Q3 2025, eir had almost 900,000 fibre customers on its fibre broadband network, alongside almost 1.6 million on its mobile network.

In addition to household broadband, mobile and TV services, eir's business to business operations also provide leading edge connectivity, Cloud and managed services supports to large and small businesses and organisations including Government departments, emergency and health services, some of Ireland's leading global and national businesses, alongside enterprises in every town, village and city in the Republic of Ireland.

Foreword.

Oliver Loomes
CEO, eir

At eir, our purpose is to Connect for a Better Ireland, and as the country's largest fixed and mobile telecommunications network, we are committed to our central role in helping Ireland be one of the most connected countries in the world.

In a country with a well-documented infrastructure shortfall in many sectors, digital infrastructure has been the quiet success story of the last five years, as eir, along with the Government and other private companies, invested billions in delivering some of the most advanced fixed and mobile networks, helping Ireland to move from laggards to leaders in the Digital Decade in Europe.

This is eir's first Digital Ireland report and comes as Ireland is half-way through the Digital Decade plan, which outlines ambitious targets in the Government's and Europe's digital roadmap between 2020 and 2030.

Using insights from usage of our networks, along with public data and research from the EU, Central Statistics office, ComReg and other sources, this report explores how consumers and businesses are embracing digital activity in their lives and operations.

The report shows there have been transformational changes in the level of data traffic, enabled by the unprecedented infrastructure investment by eir, the Government and other operators. It also uncovers new insights into the speed of change that is taking place in digital behaviour in Ireland.

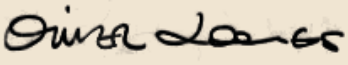
Positively, consumers and businesses are harnessing our digital infrastructure and ecosystems in ways that place Ireland in a strong position to achieve our ambition of being one of the most digitally connected societies in the world.

As we move into the second part of the Digital Decade, it will be imperative for Ireland to maintain that momentum, but this will not be without challenge. Future progress cannot be taken for granted.

The telecommunication sector operates in a challenging regulatory environment, and reforms being proposed at EU level must be pursued and implemented as a priority to sustain a positive investment environment, and ensure the commitments of high-speed connectivity for all is delivered within Government timeframes.

Government policy will need to evolve at pace to ensure the work of the last five years investing in digital infrastructure translates into widespread use and adoption. This will require innovative new policies to encourage and support businesses, particularly SMEs, to leverage the power of digital infrastructure and systems.

Policy also needs to remain focussed on digital inclusion and ensuring sufficient supports for all groups are available to enable them to participate in, and reap the benefits of, the ever-evolving digital society.



Executive summary.

- Ireland has made remarkable progress in digital infrastructure and adoption during the EU's Digital Decade. The country now ranks ahead of European averages in fibre broadband and 5G coverage and connectivity.
- Fibre broadband availability has surged from 30% of premises in 2019 to nearly 80% in 2025 and 5G mobile coverage now reaches up to 99% of the population on eir's network, supporting advanced digital services nationwide. This has been enabled by public and private investment, including €2 billion by eir.
- Data from eir's fixed network shows a surge in online data traffic in the first half of this decade, as homes and individuals embraced online activity, from home working through to gaming, streaming, online shopping and other activity. Total data traffic on eir's fixed network more than doubled between 2019 and 2025 to 5,551 Petabytes. Average household data use on eir's high speed fibre network increased by 61% from 4,513 Gigabytes annually in 2019 (equivalent to 6.2 hours of high-definition video streaming per day) to 7,272 Gigabytes per household (equivalent to almost 10 hours of high-definition video streaming per day).
- The highest data usage per household was in Kildare, where homes with fibre connections used an average of 7,800 Gigabytes each in 2024. The lowest was in county Sligo, where the average fibre household consumed 5,800 Gigabytes. Fibre-connected homes in commuter areas, and in the south and east of the country tend to use more data on average than homes in the Northwest. Regions with large cities, such as Cork and Galway, also tended to use more data on average per household compared with more rural counties.

- The roll-out of 5G services by eir has been accompanied by a massive increase in data traffic on the eir mobile network. In the six-year period from 2019 to 2025, total data traffic carried on the eir mobile network grew from just over 84,000 TB to 568,071 TB, an almost 7-fold increase in total data during that time. Alongside this, average data use per customer has surged, growing by almost 80% in the four years to the end of 2024. The regional trends on mobile data use match those for fixed line broadband services in general, with counties with large urban areas such as Dublin and Cork tending towards higher data use.
- As the use of data underwent a phenomenal increase, use of the traditional fixed phone line has also seen a steep and marked fall. Fixed line telephone use has been falling consistently in Ireland for many years, but has in recent years accelerated, dropping by 57% in a little over three years from 508 million minutes in the last quarter of 2021, to 215 million minutes in Q2 2025. Mobile voice use has been much more stable and has seen a modest increase from an average of 138 minutes per month per subscriber in Q3 2023, to 152 min in early 2025.
- The increased availability of 4G and 5G technology has also seen a transformation on how mobile devices are being used, with live streaming becoming a part of people's lives. In 2022, the first Electric Picnic post-pandemic, attendees used a total of 15,723 GB of data on the eir mobile network. By 2024 this has more than trebled to 47,174GB.

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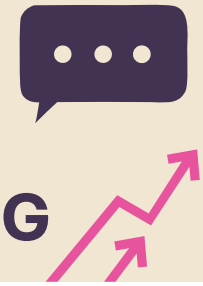


- Irish consumers have embraced the online economy to a greater extent than in almost every other European country, with 96% of internet users having purchased online in 2024, the highest share in the EU. They are ahead of the average EU consumer on almost every metric, from online learning to streaming.
- Ireland's enterprise sector is highly digitalised, with strong adoption of cloud, AI, and data analytics—well above EU averages. However, small and medium-sized enterprises (SMEs) lag larger firms in adopting advanced digital technologies and high-speed connectivity. Evidence suggests SMEs are very slow to move to high-speed broadband, with latest data suggesting approximately 30% of non-residential premises have taken up high-speed fibre, compared to over 50% in residential premises.
- Telecommunications services have become much more affordable in the last two decades and are more than 10% less expensive in absolute terms than they were in 2003, while overall consumer prices have surged in the region of 50% in the same period.
- eir's internal data suggests that older people are much less likely to have high speed broadband services. Of eir's total internet customer base, it is estimated that approximately 30% are aged 65 or over, yet account for just 25% of the fastest broadband connections over fibre. Over 65s were almost twice as likely to have the most basic ADSL internet connection (direct copper to the home) compared with customers under the age of 65.

- Data traffic is expected to continue growing on Irish telecommunications networks, driven by AI, the Internet of Things and next generation applications. Ireland is moving towards fibre-only connectivity, with copper network switch-off planned in the coming years. Policy will therefore need to shift from infrastructure roll-out to driving adoption of fibre, innovation, and digital skills.
- Policy must also ensure that the growing issue of SMEs and digital adoption is addressed, while digital inclusion measures, from training to other supports, are introduced to ensure digital inclusion for all, particularly older people with general demographics expected to see this age cohort increase significantly.
- Regulatory frameworks and Government investment must also evolve as a priority, to ensure full high-speed fixed and mobile network roll-out is delivered, and ongoing necessary investment in telecommunications infrastructure is delivered.
- Ireland's digital transformation is well underway, with high-speed connectivity and digital services now central to daily life. Continued progress will depend on Government regulatory reform, supporting SMEs, closing the digital divide, and fostering innovation and digital skills—ensuring the benefits of the Digital Decade are shared by all communities and businesses.

Section 1.

Ireland and the Digital Decade – where we stand today.

1.1. The Digital Decade

The EU's Digital Decade is the Union's shared plan to ensure that, by 2030, Europe's digital transformation benefits people, business and society. It sets practical, measurable targets across four pillars, digital skills, digital infrastructure, digitalisation of business, and digital public services, anchored in EU rights and principles so that progress is inclusive and fair. The programme exists to close gaps between Member States and make Europe more competitive, secure and sustainable in a fast-moving technological era.

Ireland has embedded the Digital Decade into national strategy and, in late 2024, submitted an adjusted strategic roadmap expanding measures to 81 initiatives with a combined €9.2bn budget (€4.8bn public). Priorities include digital skills (including cybersecurity), SME digitalisation, digital public services and resilient connectivity. Ireland reiterated its gigabit coverage by 2028 ambition while maintaining a strong emphasis on digital inclusion.

1.2. Ireland and the Digital Decade: From laggard to leader in telecommunications infrastructure

Connectivity infrastructure is the cornerstone of the Digital Decade but as of early 2020, Ireland's digital infrastructure, like housing and energy and water, bore the marks of prolonged under-investment, with just 30% of premises having access to high-speed broadband, while the 5G mobile network was still at a very early stage of development.

The story since then has been one of accelerated catch-up. Substantial private and public capital has driven rapid roll-out of fibre and 5G, moving Ireland from a position below EU averages to one of Europe's more dynamic connectivity markets.

By the third quarter of 2025, Irish high speed fibre broadband availability had risen to 81% of all premises in the Republic, with almost 9 in ten homes having access to gigabit broadband connectivity, both now ahead of the EU average. While its 5G network, almost non-existent in 2019, was now covering approximately 90% of the country[1], and this has seen Ireland leapfrog other countries in terms of digital infrastructure rankings.[2]

The success of this telecommunications roll-out has been driven by a combination of public and private investment. The Government's national broadband plan has seen a successful roll-out of fibre broadband to be made available to almost 500,000 rural homes and businesses. The private sector, including eir, has played an equally important role, with high-speed fibre broadband availability provided to approximately 1.7 million homes and businesses in the remaining parts of the country.

1 ComReg Quarterly Report, Q3 2025
2 [EU Digital...eport 2025],

1.3. eir and the Digital Decade – investing more than €2 billion in Ireland's digital future

eir has been a key driver of this digital transformation, investing approximately €2 billion in capital expenditure since 2018. Over €1.2 billion of this has gone into expanding its fibre and mobile networks between 2018 and 2024. This investment has delivered fibre-to-the-home (FTTH, also known as FTTP) to more than 1.4 million premises across urban and suburban Ireland as of the end of Q3 2025, and significantly upgraded the mobile network. eir now operates Ireland's largest 5G network and has extended 4G coverage to 99% of the country's outdoor geography. In 2024, eir committed an additional €500 million to further accelerate fibre roll-out in the coming years. eir's fibre network now reaches more than 1.4 million homes and businesses – over 70% of premises outside the Government's National Broadband Plan area. This infrastructure is a cornerstone of the Government's digital strategy to achieve nationwide high-speed connectivity by 2028.

Table 1a. County level penetration of eir fibre network

County	eir Homes Passed Sept '25
DUBLIN	299,911
CORK	175,730
GALWAY	83,683
LIMERICK	71,349
KILDARE	71,152
KERRY	58,850
DONEGAL	66,322
MEATH	60,933
TIPPERARY	51,018
WEXFORD	52,941
LOUTH	51,767
CLARE	39,957
MAYO	44,602
WATERFORD	41,293
WICKLOW	40,802
WESTMEATH	31,647
LAOIS	26,810
KILKENNY	26,715
CAVAN	23,484
OFFALY	23,805
ROSCOMMON	18,911
SLIGO	21,898
CARLOW	19,490
MONAGHAN	16,427
LONGFORD	13,302
LEITRIM	10,090
Total	**1,442,889**

Source eir.

eir's 5G mobile network

eir is one of three mobile networks operating in Ireland today, providing 2G, 3G, 4G and 5G services and ancillary services such as WiFi Calling and VoLTE.

Since 2019, eir has spent €250 million on rolling what has become Ireland's most extensive 5G network, achieving 99% population coverage earlier in 2025. 5G is the fifth generation of wireless technology for cellular networks, offering faster speeds, lower latency, and greater capacity than earlier generations like 4G. It enables a wide range of new applications and services due to its ability to handle more devices and data simultaneously. 5G boasts significantly faster data speeds, potentially reaching up to 20 Gbps, compared to 4G's peak of 1 Gbps. Latency, the delay in data transmission, is reduced with 5G, enabling more responsive experiences for applications like online gaming, video conferencing, and self-driving cars. 5G can also handle a much larger number of connected devices, including those used in the Internet of Things (IoT), without compromising performance.

The roll-out of the 4G and 5G networks has helped transform how people are using the mobile network, not just for smartphone use, but also mobile broadband, and 'the Internet of Things' via various devices that connect via 5G services, from cars to security cameras.

Section 2.

The Story So Far - How people are embracing the digital decade in Ireland.

2.1. Fixed line services – data trends since 2019

As Ireland's largest network provider, eir's fixed network usage—especially through its high-speed fibre network—offers a revealing look into the evolving behaviours of households and businesses in the digital society and economy. Recent data from the Central Statistics Office (CSO) shows that, as of 2025, 95% of all households have internet access, with 87% of these households connected via fixed broadband. Among internet users aged 16 to 29, 99% reported going online daily. In contrast, older adults used the internet less often, with only 63% of those aged 75 and over having accessed the internet in the previous three months. Students emerged as the most frequent users in 2025, with 91% going online at least once a day.

eir fixed network usage 2019–2024: a surge in internet traffic

Analysis of eir's fibre network usage over the past six years highlights major shifts in general internet activity, especially on data consumption and overall traffic volumes. Across both fibre and copper-based systems, eir's broadband network saw traffic climb from 2,742 petabytes (PB) in 2019 to 5,551 PB in 2025 – more than doubling over this period. The expansion of the fibre network, which provided residential users with speeds of up to 1 gigabyte (GB), led to a dramatic increase in fibre traffic, surging from 259 PB to 3,029 PB. This represents an almost 12-fold jump as consumers transitioned to faster fibre connections.

While much of this overall growth was driven by more homes gaining high-speed fibre connectivity, rising individual household data usage also played a key role in boosting internet traffic. In 2019, the average household on eir's high-speed fibre network used 4,513 GB over a 12-month period, equivalent to 6.2 hours of high-definition video streaming per day in 2018/2019. By 2025, annual usage had risen to 7,272 GB per household—the equivalent of almost 10 hours of HD video streaming per day—marking a 61% increase in average daily household usage during this period.

How big is a GB, TB, and PB?

Megabyte (MB)

A megabyte is a unit of digital storage, often used for small files like photos, short audio clips or documents. Everyday Example :1 MB is about the equivalent of 1 song OR 1 photo OR a few pages of an audio book.

Gigabyte (GB)

A Gigabyte is common for apps, large videos and storage on mobile phones devices and laptops. 1 GB = 1,000 MB Everyday Example : 1 GB is about the equivalent of downloading 250 songs OR 5 Audiobooks OR 1 hour of HD video streamed

Terabyte (TB)

A Terabyte is a much larger unit of storage, roughly the storage in a high-end, high powered modern laptop. 1 TB = 1,000 GB. Everyday Example: 1 TB is about the equivalent of downloading 250,000 songs OR 5000 audiobooks OR 500 hours of HD movies streamed

Petabyte (PB)

A Petabyte is enormous, think of the scale used global streaming platforms like Amazon Prime or Netflix. 1 PB = 1,000 TB

Everyday Example: 1 PB is about the equivalent of downloading 250 million songs OR 5 million audiobooks OR over 100 years of non-stop HD movies

Assumptions

Avg song size: 4 MB

Avg audiobook size: 200MB (8-10 hours, compressed audio)

Table 2a: Data trends on eir's broadband network

	2019	2020	2021	2022	2023	2024	2025	% change (2019-2025)
Total broadband traffic (PB)	2742	3895	4460	4446	4866	5236	5551	102%
Total FTTH (fibre) traffic (PB)	259	606	1068	1484	2192	3029	3880	1498%
Average household data use on fibre network (GB)	4513	4810	5976	5936	6470	6936	7272	61%

Source: eir internal data

2.2. Mobile network data trends

The launch of 5G by eir in 2019, and its subsequent roll-out to 99% population coverage, has been accompanied by a massive increase in data traffic on the network. In the six-year period from 2019 to 2024, total data traffic carried on the eir mobile networkgrew from just over 84,000 TB to just under 500,000 TB, a 6-fold increase in total data during that time.

Table 2b: Total data traffic on eir's mobile network 2019-2024

Year	Total data traffic (TB)
2019	84,205
2020	143,880
2021	228,263
2022	316,327
2023	420,809
2024	497,374
2025	568,071

2.3. The decline in stand-alone voice traffic

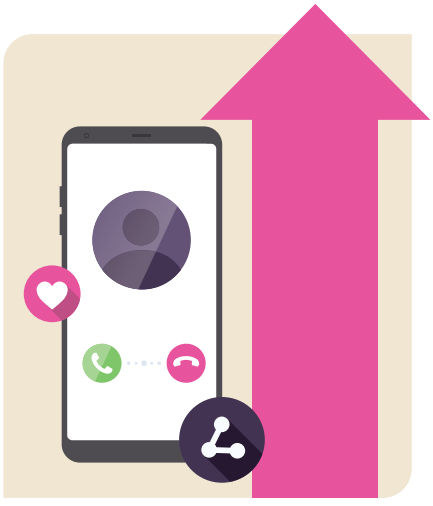
As the use of data has undergone a phenomenal increase, use of the traditional fixed phone line has also seen a very and steep marked fall. Fixed line telephone use has been falling consistently in Ireland for many years, and underwent a temporary uplift during lockdown. Decline then accelerated steeply in the three years following, from 508 million minutes in the last quarter of 2021, to 215 million minutes in Q2 2025, according to ComReg's quarterly reports which track various aspects of telecommunications use. This is a decline of 57% in a little over two years. Mobile voice use has been much more stable and has seen a modest increase from an average of 138 minutes per month per subscriber in Q3 2023, to 152 min 21 months later in 2025.

Table 2c: Fixed voice traffic (total minutes)

Quarter	Fixed voice minutes (000s)	Minutes (millions)
Q2 2020	724,480	724.5
Q4 2021	508,209	508.2
Q4 2022	399,855	399.9
Q4 2023	281,213	281.2
Q1 2024	272,094	272.1
Q2 2024	262,622	262.6
Q3 2024	248,003	248.0
Q4 2024	225,345	225.3
Q1 2025	228,294	228.3
Q2 2025	215,252	215.3

Source: ComReg Quarterly Key Data Reports

While further sections will look in greater detail at consumer and business behaviours driving the Digital Decade, it is clear from the above that a significant shift away from traditional telephone services has been accelerated with the availability of fibre and high speed mobile connectivity, as consumers switch to mobile voice, to apps and other means of staying connected, as the surges in data would suggest.



2.4. Regional Breakdown

With the most extensive fixed network in the country, it is also possible to use eir's traffic records to examine data trends on a more localised county basis. Overall, it shows homes that have signed up to high-speed fibre services consume significant quantities of data.

The highest data usage per household was in Kildare where premises on the eir gigabit fibre network used an average of 7,800 gigabits each in 2024, the equivalent of streaming HD TV on one device continuously 24 hours a day for 325 days. The lowest was in county Sligo where the average fibre household consumed 5,800 gigabytes in the same period or the equivalent of 241 days of continuous streaming on one device.

More broadly, homes with fibre services in commuter areas and in the south and east of the country tend to use more data on average than homes in the North West. Louth, Dublin Carlow, Offaly, Westmeath, Wicklow and Waterford were the counties with the highest data users on average, while the lowest included Donegal, Mayo, Leitrim and Sligo. Regions with large cities such as Cork and Galway also featured towards the top of the list.

Various explanations may account for this, including levels of commuters in regions, home working, or average household age, with younger people tending to use higher levels of data due to lifestyle factors such as gaming and video streaming.

Overall, the county-by-county breakdown shows that average data use is growing significantly across all regions. Cavan and Meath experienced the highest average traffic growth per household of 22% between 2022 and 2024, followed closely by Offaly, with Westmeath, Cork, Kerry and Monaghan, at 20%.

All counties have a minimum growth in average data use of at least 10% in the two-year period, with Tipperary the lowest at 11% of all counties, and Dublin having the second lowest data growth rate of 12%.

Table 2e: Average gigabytes used per premises

County	2022	2023	2024
Unit	Total average Gigabytes per household used		
Dublin	6800	7400	7600
Cork	5600	6200	6700
Galway	5400	5900	6300
Kildare	6700	7300	7800
Donegal	5200	5700	5900
Limerick	5900	6400	6800
Meath	5900	6600	7200
Tipperary	6200	6500	6900
Wexford	5900	6400	6800
Louth	6200	6800	7300
Kerry	5100	5700	6100
Mayo	5200	5700	5900
Clare	5500	6000	6400
Wicklow	6200	6600	7100
Waterford	6100	6500	7100
Westmeath	6000	6700	7200
Laois	6500	7000	7600
Offaly	6200	7000	7500
Kilkenny	5700	6100	6700
Cavan	5400	6100	6600
Carlow	6400	7000	7600
Sligo	5100	5600	5800
Monaghan	5100	5500	6100
Roscommon	5400	5900	6300
Longford	5700	6100	6600
Leitrim	5100	5600	5900

Source: internal eir data

2.5. Data trends on eir's mobile network.

With the advent of 5G technology, eir has been to the forefront in upgrading its mobile network since 2019, where it has now achieved 99% population coverage. 5G technology, which delivers high upload and download speeds, has, along with its 4G predecessor, led to a fundamental shift in the patterns of mobile phone use. This has empowered the use of much more data heavy applications, such as video sharing, video streaming, gaming and 'hotspotting'.

The regional trends on data use match those for fixed line broadband services in general, with counties with large urban areas such as Dublin and Cork tending towards higher data use.

What is common to all regions is the pace of growth in average monthly data use by customers, which increased by almost 80% in the space of four years.

Counties with Ireland's largest cities (Dublin, Cork, Limerick, Galway, Waterford) had an average 2025 monthly usage of 19.27 GB and an average growth of 76.73%. Rural counties averaged 17.39 GB in 2025 but had a slightly higher growth rate of 77.64%

Key findings

1. County with highest monthly data use in 2025: Dublin (21.56 GB)
2. County with lowest monthly data use in 2025: Kerry (15.86 GB)
3. Largest percentage increase (2021 to 2025): Clare (+100.10%)
4. Average percentage increase across all counties: 77.46%

Table 2f: Top counties by monthly mobile data usage, 2025

Position	County	2025 monthly Usage (GB)
1	Dublin	21.56
2	Clare	20.09
3	Cork	19.78
4	Laois	19.18
5	Offaly	19.03

Source: internal eir data

Table 2g: Top counties by percentage increase (2021–2025) in mobile data use

County	% Increase
Clare	100.10%
Louth	98.36%
Dublin	92.16%
Cavan	88.98%
Laois	88.41%

Table 2.h: Average monthly mobile data use (GB) by county (2021–2025)

County	2021	2022	2023	2024	2025
CARLOW	9.64	11.47	14.4	15.7	16.49
CAVAN	9.53	12.07	15.51	17.29	18.01
CLARE	10.04	11.57	14.97	18.59	20.09
CORK	11.14	13.06	16.22	18.28	19.78
DONEGAL	9.39	10.87	13.64	15.54	15.99
DUBLIN	11.22	13.42	17.38	19.97	21.56
GALWAY	10.33	11.71	14.94	16.92	18.04
KERRY	9.05	10.44	13.35	15.21	15.86
KILDARE	9.25	11.09	13.89	15.85	16.48
KILKENNY	9.74	11.34	14.73	16.46	17.28
LAOIS	10.18	12.78	16.38	18.36	19.18
LEITRIM	9.98	11.59	13.89	16.42	16.59
LIMERICK	11.17	13.12	16.22	17.51	18.7
LONGFORD	10.32	12.44	15.88	17.83	18.57
LOUTH	9.17	11.31	14.66	17.01	18.19
MAYO	9.59	10.93	13.8	16.05	17.19
MEATH	9.7	11.69	15.09	17.12	17.82
MONAGHAN	9.66	11.21	13.27	14.74	15.88
OFFALY	11.28	13.57	16.64	18.83	19.03
ROSCOMMON	10.07	12.26	15.05	16.34	17.43
SLIGO	9.3	10.02	13.02	15.39	16.39
TIPPERARY	9.69	11.84	15.33	16.65	17.44
WATERFORD	10.64	12.33	15.87	17.67	18.29
WESTMEATH	11.09	12.76	15.54	17.14	18.0
WEXFORD	9.53	11.08	13.89	16.04	16.34
WICKLOW	9.55	11.43	14.97	16.4	16.91

Section 3.

Ireland's Digital Habits

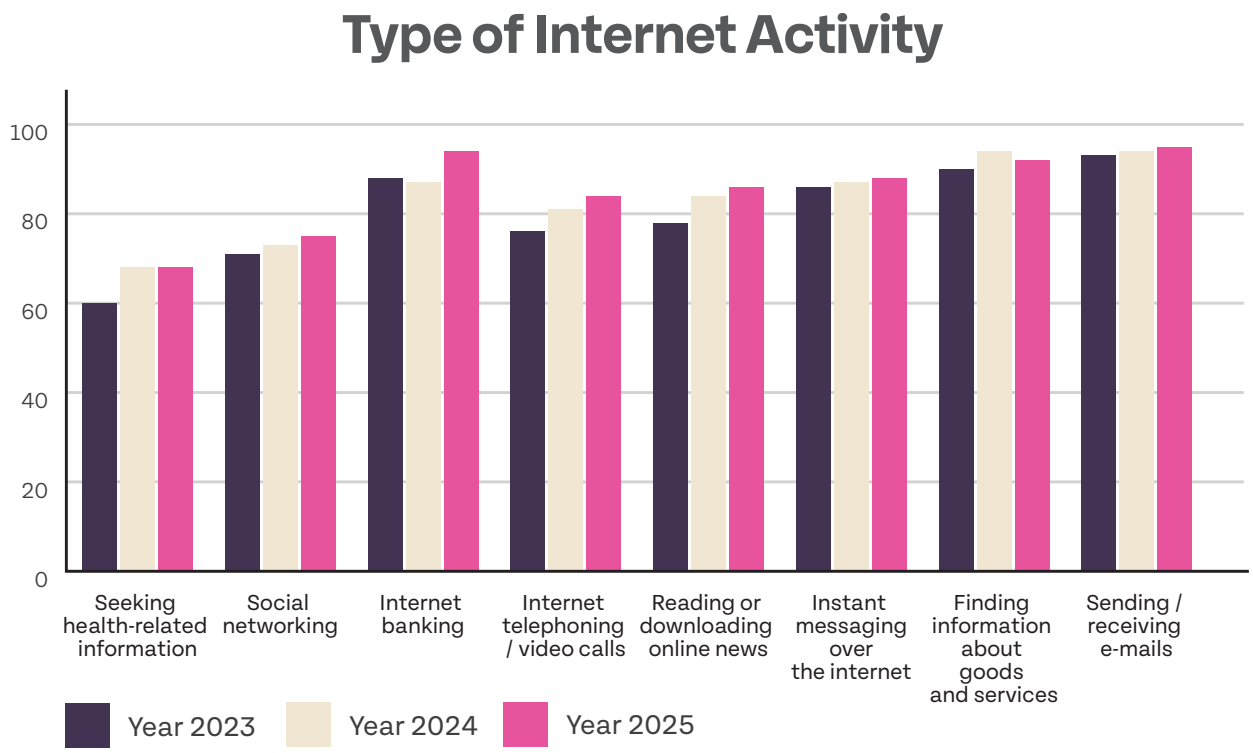
3.1. Ireland - a nation of digital consumers

The figures from both the fixed and mobile network show a massive growth in the overall use of both networks in terms of data. This has been driven by data heavy apps and services, such as video streaming, social media apps and gaming. They are augmented consumer experiences, including sporting and music events, facilitating remote working and a substantial increase in online commercial activity. The CSO has been tracking internet use showing that the digital society and economy is embedded across multiple aspects of everyday life.

According to the 2025 CSO Report on Digital Consumer Behaviour[3], **email** was the most common internet activity at **95%** of internet users. **Online banking** is now the second most popular internet activity, with 94% of respondents having using it in 2025. **Finding information on goods and services** ranked third at **92%** of users. Digital communication is ubiquitous: **75%** of internet users use social networking or messaging apps (up from 73% in 2024), and internet telephony/video calls remained high at **84%** usage in 2025. [rte.ie]

E-commerce remains very high, **85%** of internet users made online purchases in 2025, buying everything from clothing to groceries. Clothing and accessories were the most common online purchases (70% of users bought these), while 7 in ten consumers now subscribe to at least one streaming service, such as Netflix or Disney.

Meanwhile, **42%** of internet users reported using **generative AI tools** (e.g. chatbots or AI image generators) in 2025, with almost two thirds of users in the 16-29 age category having used such tools.



Source: CSO

3 Household Digital Consumer Behaviour 2025 - Central Statistics Office

3.2. If you don't share - you weren't there – major events now driving data spikes

The increased availability of 4G and 5G technology has also seen a transformation on how mobile devices are being used. One of the most significant trends has been the use of data dependant apps during major social and sporting events, with an increased trend to upload and share live content.

eir has been measuring data use at key events across recent years, and they show a massive upward trend in data use.

The Electric Picnic is a key example. In 2022, the first Electric Picnic post-pandemic, attendees used a total of 15,723 GB of data on the eir mobile network. By 2024 this has more than trebled to 47,174GB. All major music events and festivals have shown similar trends in data use increases.

This has also been mirrored during sporting and music events at the Aviva Stadium. In 2024 the heaviest data traffic event at the stadium was during the American Football College game between Georgia Tech and Florida State, when fans used a total of just under 1,500 GB of data, 50Gb more than Taylor Swift fans a few weeks before.

International Rugby games have also seen an increase in data use, with the Ireland–France game in 2024 recording 20% higher usage compared to the Ireland–Scotland game the previous year.

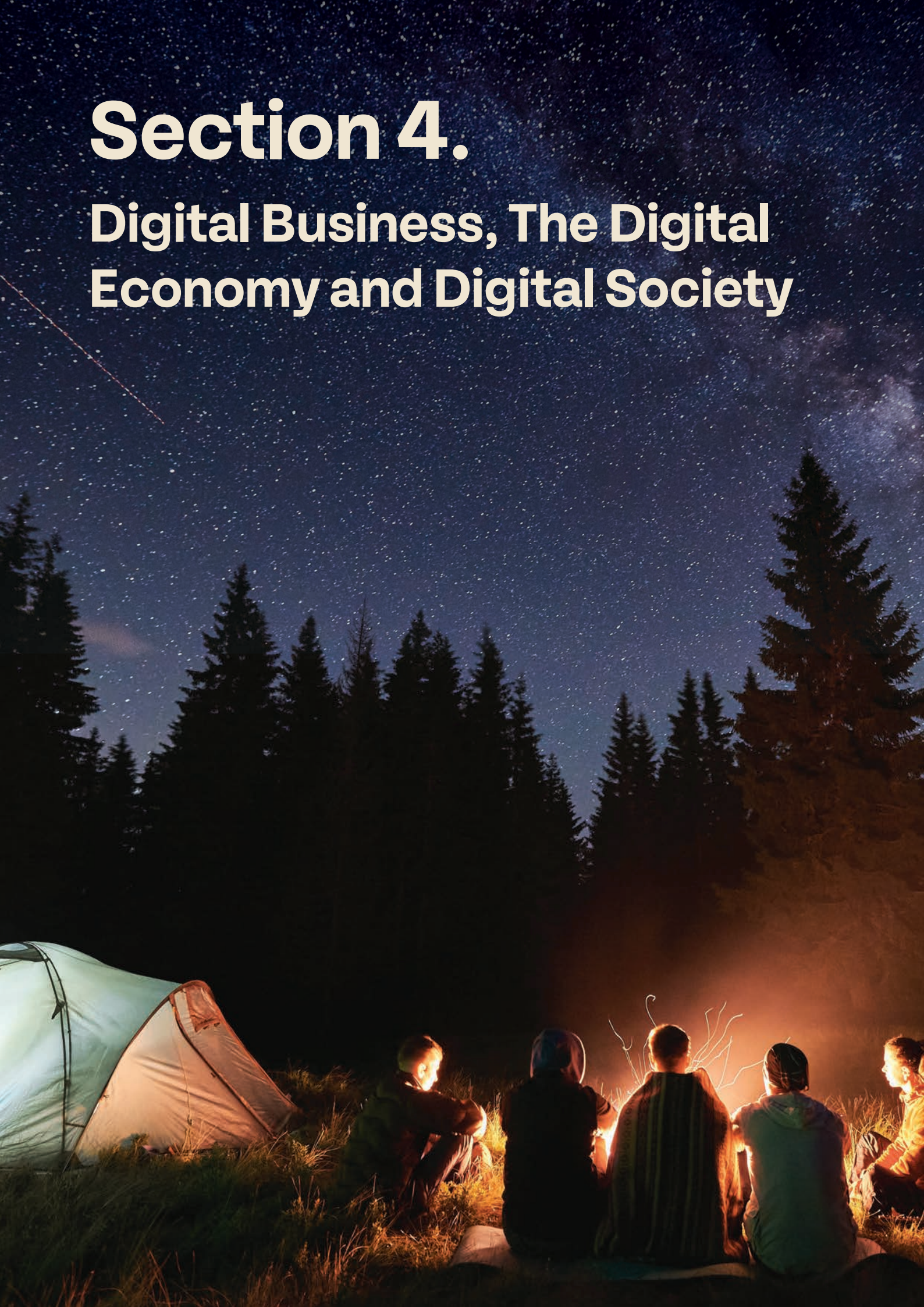
Table 3.b: The Data: A Summer of Spikes - eir's network data from Ireland's major festivals in 2025 shows unprecedented growth in mobile data usage:

Event	Date	Data usage (GB)
Electric Picnic	28/09/2025	100,109
Malahide Castle	17/06/2025	17,320
National Ploughing Championships	16/09/2025	17,261
Marlay Park	24/06/2025	15,960
All Together Now	01/08/2025	14,490
Kaleidoscope	04/07/2025	10,176
St Anne's	27/05/2025	6,948
Bloom	29/05/2025	4,500

Shared experiences are now core to live events: The phrase "You weren't there if you didn't share" has become reality, with attendees expecting to capture and instantly broadcast their experiences, making connectivity as essential as the stage or the pitch. **Uplink demand is driving network strategy:** Whereas mobile networks were historically optimised for downloads, today's events see uplink traffic—video uploads, live stories, and real-time sharing—dominate, necessitating new capacity planning and spectrum allocation. **Events are digital ecosystems:** Beyond social media, every aspect—tickets, payments, maps, food ordering, ride-hailing—relies on robust connectivity, making the event experience both on-site and online, with networks required to provide seamless integration. **Consumer behaviour is permanently shifted:** This is not just a post-pandemic trend but a sustained change, as seen in the growth curve at Electric Picnic and Aviva Stadium events, showing that sharing is now embedded in audience behaviour, and expectations for instant connectivity will only increase.

Section 4.

Digital Business, The Digital Economy and Digital Society



The **EU Digital Decade** is the European Union's strategic programme to guide and accelerate Europe's digital transformation by 2030. It sets out a vision for a digitally empowered, competitive, secure, and sustainable Europe, with concrete targets and goals across four key areas: **Skills, infrastructure, transformation of businesses and digitalisation of public services**. As the previous sections have shown, the provision of infrastructure, including by eir, has prompted a surge in data traffic and online activity across a range of areas. Progress against these targets are measured on a country-by-country basis, including in Ireland, and this research can and does provide a much deeper understanding of where Ireland is today in terms of the Digital Decade.

4.1. The Enterprise and business sector

Ireland is the host of the European headquarters of many of the largest IT and digital firms in the world and become associated with an advanced and digitally connected enterprise sector.

Research from the EU Digital Decade confirms this across the business at its broadest sense:

- **Advanced Technologies:** 64.1% of enterprises use AI, cloud, or data analytics—well above the EU average (54.7%). However, adoption gaps persist between large firms and SMEs.
- **Cloud Adoption:** 53.1% of Irish enterprises use cloud services (EU average: 38.97%). SMEs' adoption is 52.3%, while large enterprises are at 79.5%.
- **AI Adoption:** 14.9% of enterprises use AI (EU average: 13.5%). Only 13.8% of SMEs use AI, compared to 50.8% of large enterprises.
- **Data Analytics:** 37.1% of enterprises use data analytics (EU average: 33.25%). SME uptake is 35.9%, large enterprises 77.4%.
- **ICT Security Measures:** 86.2% of firms have some form of ICT security measures; 69.2% include staff awareness and training.

In addition, 73% of people have basic or above-basic digital skill, 3rd highest in the EU behind the Netherlands (83%) and Finland (82%).[4] Irish businesses have also embraced the online economy - 40% of Irish businesses sell online—2nd in the EU, just behind Lithuania (42%).

4.2. Irish consumers in the digital economy

In parallel Irish Consumers have embraced the online economy like no other country, with 96% of internet users having bought online in 2024, the highest share in the EU and are ahead of the average EU consumer on almost every metric, from online learning to streaming.

4 European Commission: Ireland 2024 Digital Decade Country Report | Shaping Europe's digital future (europa.eu)

Table 4b: Digital Activity Comparison: Ireland vs EU Average

Activity	Ireland	EU Average
Online Shopping (Any)	85%	75%
Clothes/Shoes Online	77%	65%
Streaming Services	69%	55%
Online Learning	34%	20%

Source: Eurobarometer

4.3. The digital challenge for SMEs

There is however a challenge facing Ireland according to recent research, relative to the SME sector. Digital Decade 2025 country reports shows that while almost three in four SMEs have at least a basic level of digital intensity, slightly above the EU average, progress has stagnated since 2022, in contrast to many other countries, which saw an annual increase of 2.8%.

At a closer level, 39.56% of Irish SMEs reached a high level or very high level of digital intensity, significantly exceeding the EU average of 32.66%. While positive, it highlights a clear divide between a group of digitally advanced firms and a group of slower-moving firms, which the report says continues to present a structural challenge.

Looking at other sources of information, a significant issue appears to be emerging on SME take-up of high-speed data connectivity. High-speed connectivity is the prerequisite for digital capabilities amongst enterprises. And while ComReg data suggests there has been significant take-up of high-speed fibre in homes, the same cannot be said of the SME business sector. ComReg last year began to report on Fibre and Gigabit broadband network availability and take-up separated by both residential and non-residential premises. Non-residential premises include office space, community and other commercial premises, and cover almost all SME premises in the country.

The data shows that the take-up rate for high-speed internet connections in non-residential premises is running at just under 30%, compared with more than 50% take-up in residential premises.

There will be several factors in this significant gap including higher vacancy rates in commercial properties, but it never-the-less suggests that businesses are much more likely to be relying on slower internet connections, which indicates a fundamental and significant problem for many SMEs. It suggests that thousands of companies have fibre connectivity available but have chosen not to avail of it, due to several reasons, including lack of knowledge, costs of switching to new equipment, or more worryingly, not seeing digitisation as a priority for their business.

Table 4c: Fibre to the premises coverage and take-up by address Type

Total Gigabit Coverage	2024 Q2	2024 Q3	2024 Q4	2025 Q1	2025 Q2
Percentage Premises with FTTP Broadband Available	**68%**	**71%**	**74%**	**75.70%**	**78.50%**
Residential	68.70%	71.50%	73.90%	75.90%	79.00%
Non-Residential	60.30%	62.70%	65.40%	67.60%	70.00%
Mixed	58.70%	62.50%	66.80%	70.20%	74.80%
Percentage Premises with Gigabit (FTTP or Cable) Available	**81%**	**83%**	**85%**	**86.00%**	**87.70%**
Residential	81.90%	83.90%	85.30%	86.50%	88.50%
Non-Residential	69.80%	72.10%	74.30%	76.30%	78.40%
Mixed	58.80%	62.60%	66.80%	70.30%	74.80%
Total Gigabit Coverage	**2024 Q2**	**2024 Q3**	**2024 Q4**	**2025 Q1**	**2025 Q2**
FTTP take-up Rate	**47%**	**48%**	**49%**	**49.60%**	**50.20%**
Residential	48.50%	49.20%	50.70%	51.40%	52.00%
Non-Residential	26.50%	27.20%	28.00%	28.50%	29.80%
Mixed	43.70%	43.80%	45.00%	45.20%	45.70%
Gigabit (FTTP or Cable) take-up Rate	**56%**	**57%**	**57%**	**57.90%**	**58.40%**
Residential	58.10%	58.50%	59.80%	60.30%	60.80%
Non-Residential	32.20%	32.70%	33.30%	33.70%	34.80%
Mixed	43.70%	43.80%	45.00%	45.20%	45.70%

Source. ComReg Quarterly Data report

4.4. The Digital Divide

The **digital divide** refers to the gap between individuals, communities, or countries that have access to modern information and communication technologies. The issue is acutely important for competitiveness of the economy.

Digital access – availability and affordability

On the first issue of availability, the roll-out of both gigabit fibre and 5G mobile infrastructure has led to the widespread availability of high-speed internet services, regardless of socioeconomic background or location, addressing one of the biggest issues for equal access to services. According to the latest CSO survey of internet use, just 5% of people reported that broadband internet was not available in their area.[5]

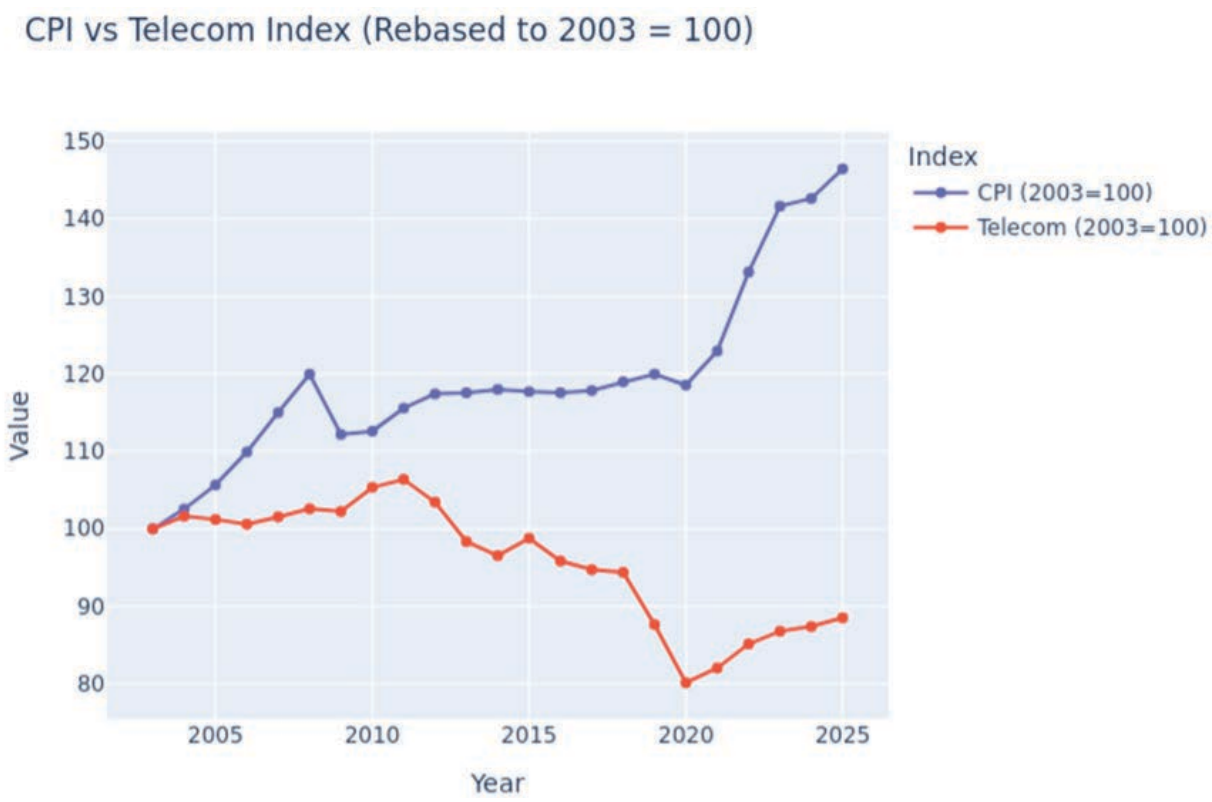
A second issue is affordability - With increasing reliance on digital products and services there has and continues to be concern about digital inclusion, with the Government publishing a new roadmap in 2023[6]. One concern has been the issue not just of infrastructure access, but also that of affordability. The Central Statistics Office, via its consumer price index, has monitored the costs of telephony products and services, as part of its index for many years. It shows that overall costs of telephone and internet services are significantly lower than they were 10 years ago. The CPI measures mobile

5 Internet Coverage and Usage in Ireland 2025 - Central Statistics Office
6 Digital For Good: Ireland's Digital Inclusion Roadmap (www.gov.ie)

and broadband costs via a sub-index: “telephone and telefax equipment and services”. According to this data, these services were approximately 11 per cent cheaper in December 2024, compared with 2003. This is at a time when overall CPI increased by approximately 46% from 2003 to 2025, reflecting broad-based inflation in the Irish economy.

In addition, average price increases during the recent period of inflation are significantly below other goods and services, increasing by less than 4 per cent in total between December 2021 and December 2024.

Chart 4d: CPI vs Telecom Index



Source: CSO

In addition to the CPI, the CSO's annual report on internet usage, cost of access is identified as a reason for not having internet access for just 7% of respondents, compared with 55% who cite lack of need as the primary reason.

4.5. Digital Skills and Service take-up

72.9% of the Irish population have at least basic digital skills, well above the EU average of 55.6%).[7] However, there is a persistent gap: digital skills are lower among older people, those on lower incomes, and those living in rural areas[8]. In terms of usage, eir's own internal data for customers indicates a significant difference in high-speed internet take-up between older and young people.

Of eir's total internet customer base it is estimated that approximately 30% are aged 65 or over, yet they account for just 25% of the fastest broadband connections over fibre. In addition, this group are almost twice as likely to have the most basic ADSL internet connection (direct copper to the home) compared with customers under the age of 65.

Table 4e: eir internet customers by age and service type

Age	Total Service	% by Service (Fibre to home)	% by Service (NBI)	% by Service (fibre to cabinet)	% by Service (ADSL)	Total % Service
<65	68%	74.7%	68.2%	57.5%	26.1%	68.5%
65+	30%	24.7%	31.1%	40.8%	46.4%	29.8%
Unknown	2%	0.6%	0.7%	1.7%	27.5%	1.7%
Total	100%	100.0%	100.0%	100.0%	100.0%	100%

Source: eir internal data

7 Ireland 2024 Digital Decade Country Report | Shaping Europe's digital future (europa.eu)
8 Digital Inclusion in Ireland: Connectivity, Devices & Skills | The National Economic and Social Council - Ireland (nesc.ie)

Section 5.

Meeting Ireland's Future Digital Needs

Ireland is undergoing a profound digital transformation, evidenced by the dramatic rise in data traffic nationwide. This shift is affecting every aspect of daily life. As outlined in this report, Ireland now ranks among the top European countries for fibre broadband and 5G coverage, with millions of homes and businesses now benefitting from high-speed connectivity. This infrastructure leap has not only allowed Ireland to surpass EU averages but has also empowered communities, businesses and individuals to embrace new ways of living and working.

As we enter the second half of the Digital Decade, several emerging trends will shape Ireland's digital future.

Digital Acceleration will drive continued Growth in Data Traffic

Data traffic is expected to grow steadily across both fixed and mobile networks, driven by technological advancements, AI adoption, Cloud Computing, the Internet of Things (IoT) and increasing consumer demand. For example, 5G continues to expand rapidly, with over 2.16 million subscriptions recorded by middle of 2025 – representing a 26% year-on-year increase from Q2 2024 in Ireland. Globally, mobile data traffic grew by 19% YoY in Q1 2025 and is projected to double by 2030, largely due to video and AI-enabled services, according to Ericsson.

5.1. High speed connectivity – available everywhere and all the time – will be the cornerstone of digital acceleration

With these trends, the availability of secure, reliable and universally available high-speed fibre and mobile connectivity, will remain a foundational priority. Ireland's fixed fibre network is a generational investment, already delivering speeds up to 5Gbps with potential for further scaling. Similarly, 5G mobile networks offer high data capacity and are poised for continued evolution.

Ireland is now ahead of EU averages on high-speed connectivity availability, and this will need to continue. Focus will equally be required, not only on delivering universal fibre and 5G availability, but also on ensuring these services have the highest levels of reliability and security. The role of Government in addressing blackspots, while also ensuring a positive regulatory environment that promotes private infrastructure investment, will be critical.

Additionally, there will be an ongoing and future focus on resilience and back-up, with satellite connectivity to support fixed and mobile networks emerging as an opportunity in Europe, with eir and others collaborating with Government, to progress these solutions for critical services.

5.2. Mobile networks will no longer be about 'one size fits all'

5G is poised to evolve further, supported by AI technologies that will enable enhanced services. As digital acceleration continues, network service demands will evolve along differentiated lines.

For example, businesses can design mobile data services optimized for specific applications—such as video streaming, gaming, or smart manufacturing—each requiring differentiated service performance like latency or bandwidth.

One such innovation is **network slicing**, made possible by 5G Standalone (SA) and 5G Advanced. This allows multiple independent virtual networks to operate on a single physical infrastructure; each tailored to specific use cases or customer needs.

Network slicing will be critical for the development of real time applications in Ireland and across Europe. It also holds significant potential for emergency and essential services by enabling secure, high-quality, low latency, and robust communication channels.

5.3. Transition to Fibre-Only Connectivity on our fixed networks

Ireland is moving toward fibre-only connectivity, which will further accelerate data growth on fixed networks. The EU has set a target of 2035 for the copper network switch-off across Europe.

As the owner of Ireland's copper network, eir is working closely with ComReg on a detailed switch-off plan set to begin in the coming years. A key challenge will be ensuring that residential users, businesses, and public services are ready to transition proactively to fibre.

A successful switch-off will require government support, including:

- Replacing older copper-dependent personal health alarms with fibre- or mobile-compatible models.
- Aiding small businesses with equipment upgrades to enable fibre connectivity
- Embracing technology evolution across public sector agencies and bodies.

It will also be important for Government to continue its work on supporting completion of the fibre network into urban and other blackspots outside of the national broadband plan areas in a timely and effective manner.

5.4. The Internet of Things (IoT) in a hyperconnected world

Whether it is smart cars, smart cities to automated heating systems and other connected devices, the Internet of Things (IoT) relies increasingly on home Wi-Fi or mobile networks, and this trend is expected to accelerate significantly over the remainder of the decade. The Internet of Things (IoT) has evolved from experimental deployments towards becoming an essential element of of global competitiveness. Over the next five years, it is predicted that the IoT will transition from isolated pilots to integrated systems connecting industries, cities, and everyday life growing globally from 18.8 billion connections in 2024 to around 43 billion by 2030.[9]

It is predicted that the IoT will become inseparable from economic functioning, and while Ireland and Europe are well positioned to take advantage, experts highlight the Continent's fragmented regulations and legacy infrastructure slow scale of change, compared to Asia's rapid roll-out and North America's mature ecosystems, as significant potential barriers that need to be addressed.[10]

Smaller, more geographically spread data centres, including edge and micro data centres, are seen as an essential evolution, and are being deployed closer to end-users and data sources to support more real-time applications like IoT, autonomous vehicles, and AI inference, which require much lower latency.

These centres will be complementary to, rather than replace, hyper data centres, and can also have environmental and energy advantages. They consume less energy, by being more optimised and with reduced long distance data transmission. They can also be more easily paired with renewable energy sources.

9 IoT connections forecast – Ericsson Mobility Report (2024)
10 The Five Year Trajectory of IoT: Institute of Internet Economics: 2025

5.5. Policy Evolution and Strategic Focus

Government policy must evolve to meet emerging challenges and opportunities. The commitment to updating Ireland's national Digital and AI strategy is a welcome step, as is the publication in December of the Government's Accelerating Infrastructure report, which is an important marker on the Government's ambition on significant reform to promote overall infrastructure development.

Key policy areas for the second half of the Digital Decade include:

- **Completing roll-out and evolving policy towards to promoting high speed connectivity take-up** Recent policy has focused on expanding high-speed connectivity—especially through the National Broadband Plan— to good success which focussed Government investment in rural areas. But as this programme completes in 2026 Government policy will need to evolve to tackle and remove barriers to roll-out in any remaining blackspot areas. In addition to this, Government policy must also shift towards adoption. Fibre take-up remains low in non-commercial premises, and targeted support for SMEs will be essential, alongside other supports for individuals and families to take-up high speed internet services.
- **Digital for all:** Ireland performs well on digital skills, but the pace of change driven by GenAI demands continuous innovation in digital education—from basic literacy to advanced capabilities. More broadly Government must ensure no one is left behind, and policies should support older people and any other identified groups in transitioning to fibre and digital services. In doing so it should have regard to hidden barriers, including lack of awareness, technical limitations and affordability to avail of digital services. Addressing them requires proactive incentives and support. Without intervention, disparities in digital access and literacy could deepen, particularly with the Irish population profile projected to age significantly over the coming two decades.
- **From adopters to innovators:** Irish consumers are among Europe's most enthusiastic digital adopters. To capitalize on this, Ireland must foster innovation and entrepreneurship in the digital sector. Ireland already has a vibrant and successful enterprise support system, via agencies such as Enterprise Ireland, but Ireland should prioritise digital innovation as potentially its number one enterprise policy.
- **Fit for purpose regulation:** The telecommunications sector stands out in terms of infrastructure in that a significant majority of the investment that has delivered world class connectivity in Ireland has been through the private sector, including eir and other operators. This cannot be taken for granted. As digital technologies evolve, so too must regulatory frameworks—ensuring access, security, resilience and creating the conditions for ongoing investment. The Government has made overall commitments on regulatory reform, and the EU is committed to streamlining digital regulation via the Digital Networks Act and other initiatives. The current regulatory environment for telecommunications, should it remain largely unchanged, risks legislating for the past, not the future, creating ongoing and unsustainable levels of regulatory burden that have the potential to have a dampening effect on future investment. Therefore, if Ireland is to continue its current positive trajectory in terms of the Digital Society and Economy, it must have a positive and fit-for-purpose regulatory environment. As has been emphasised in various international reports, including the Draghi Report

for the European Union, Europe and its countries need simpler, more harmonized rules, investment-friendly telecommunications policies, and a future-proof approach to universal service and security. Without these changes, the EU and Ireland risks falling behind the U.S. and Asia in next-generation connectivity. Furthermore, the Government's in its Accelerating Infrastructure report has identified regulatory simplification as a key objective. It will be important this simplification process examines, not just the regulatory approval processes for infrastructure approval, but the wider regulatory environment in which sectors like telecommunications operate, which is a critical factor for investment decisions.

Conclusion

Ireland's digital transformation is well underway, with high-speed connectivity now a reality for millions.

While other infrastructure challenges in housing, energy and water remain, the story of digital infrastructure in Ireland over the last five years is remarkably different where private investment by eir and other companies, coupled with Government investment through the National Broadband plan, has led to the roll-out of some of the best digital fixed and mobile networks in Europe.

The information in this report shows very clearly that Irish consumers are using these networks and have embraced the digital decade. The remarkable surge in data usage reflects a society embracing digital-first living—from streaming and remote work to online services.

To date this has been done in a way that has helped to minimise the Digital Divide. Digital skills are significantly ahead of European averages and while regional disparities persist in terms of skills and take-up, overall digital adoption is strong and telecom service costs have remained stable or declined—supporting digital inclusion.

This however cannot be taken for granted. There are emerging challenges around SMEs and digital adoption alongside demographic disparities around digital adoption especially when it comes to older people.

It means that continued progress requires targeted policy action. SMEs need support to fully leverage digital tools, and older populations and other marginalised groups must be empowered to participate. The risk of a two-tier digital society remains and must be addressed through inclusive regulation, incentives, and investment in digital literacy.

Investment cannot and must not be taken for granted, and regulatory reform will be required for the next phase of private investment.

Ireland is well positioned to remain and enhance its position as one of the most digitally connected societies in Europe and globally. By keeping its focus on affordability, infrastructure, and inclusive innovation, particularly in AI and cybersecurity, Ireland can ensure that the benefits of the Digital Decade are shared by all.

The next frontier will be defined not just by technological advancement, but by our ability to build a truly inclusive, resilient, and future-ready digital society.

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for all.