An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q2 2024

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, 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 presentation 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 April 2024 to 30th June 2024. The report is based on submissions from 52 active operators.

The report contains the following key charts/data:

- Overview of Markets
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- Fixed Markets
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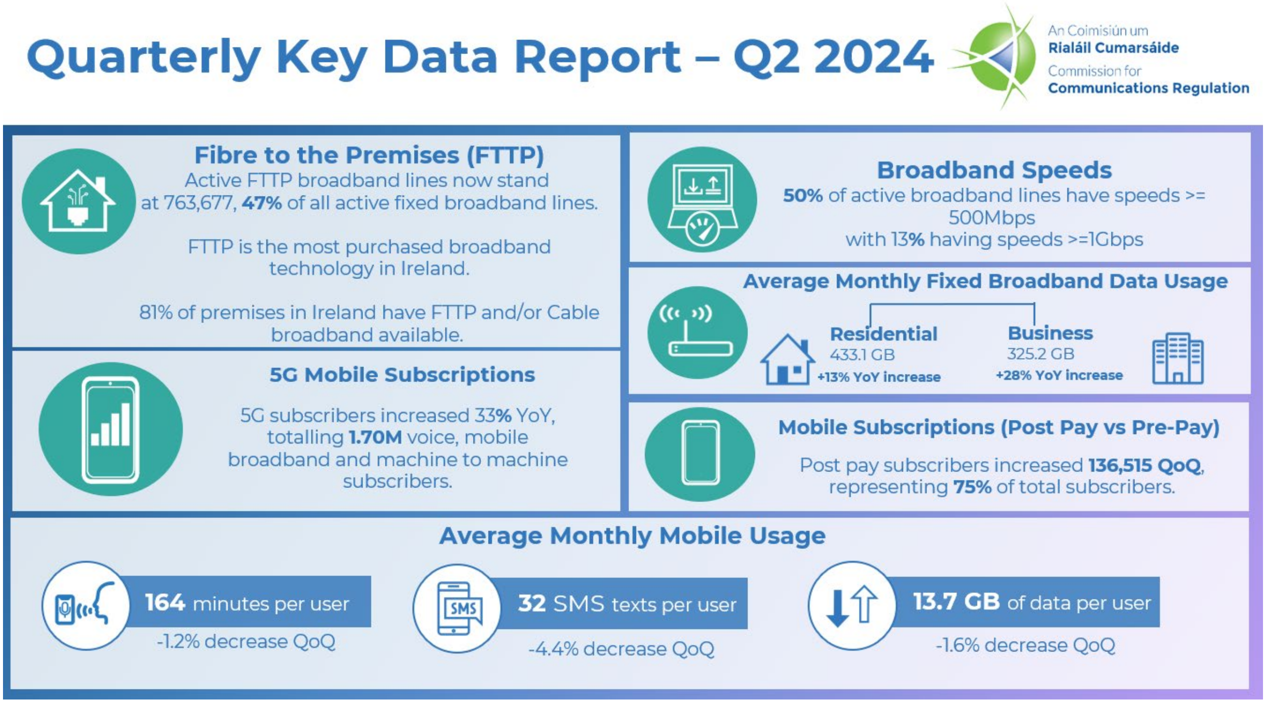
2. Q2 2024 Infographic



3. Overview of Irish Communications Market Q2 2024

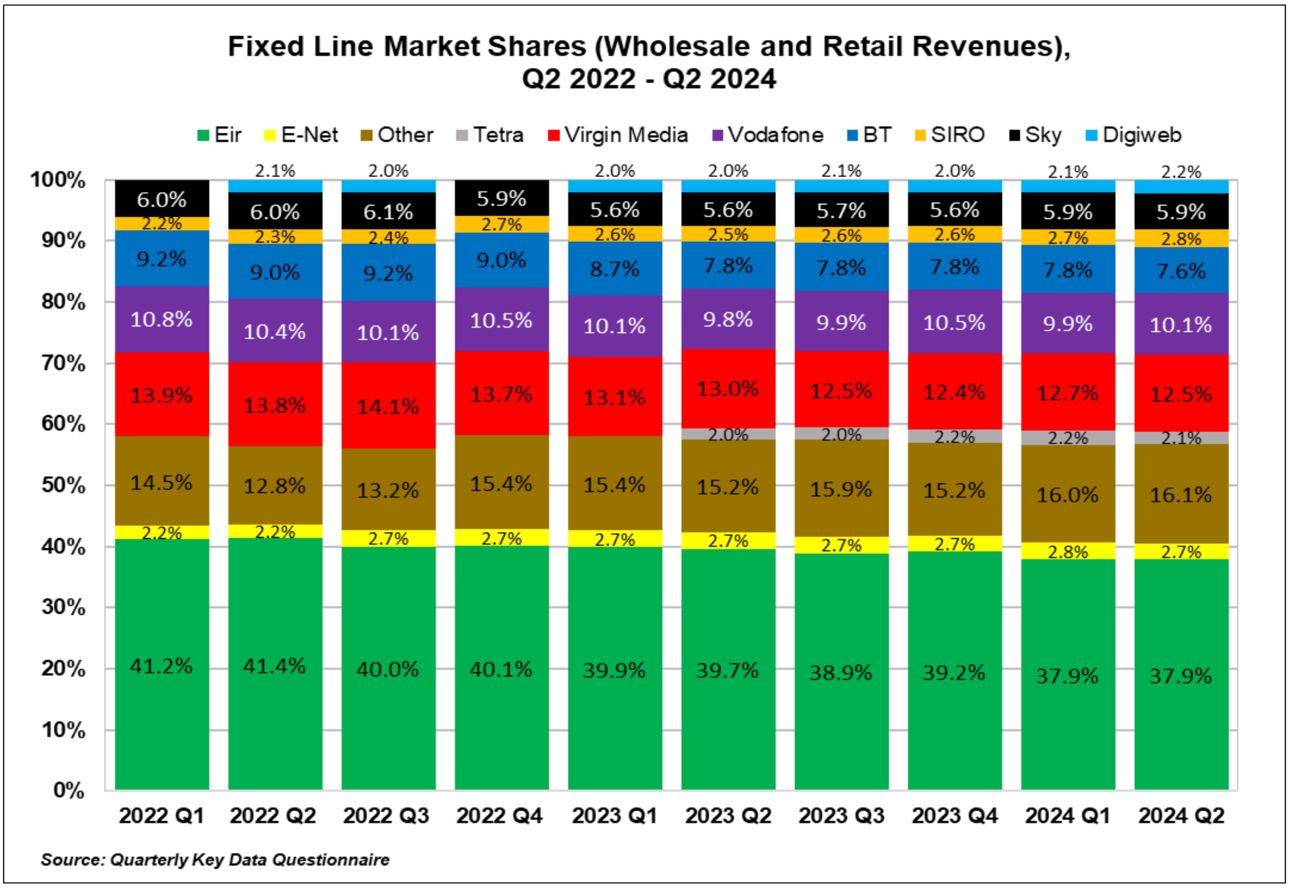
Table 1 - Communications Summary

Revenues	2024 Q1	2024 Q2	QoQ	YoY
Total Retail Market Revenues (000s)	€912,865	€925,816	1.42%	1.36%
Total Fixed Line Wholesale Revenues (000's)	€158,370	€159,363	0.63%	4.33%
Total Mobile Wholesale revenues (000's)	€29,785	€31,975	7.35%	-10.05%
Voice Traffic	**2024 Q1**	**2024 Q2**	**QoQ**	**YoY**
Total Voice Traffic Minutes (000s)	3,164,749	3,133,384	-0.99%	-3.95%
Total Fixed Voice Minutes (000's)	281,567	262,622	-6.73%	-18.16%
Total Mobile Voice Minutes (000's)	2,883,182	2,870,762	-0.43%	-2.39%
Subscriber Lines	**2024 Q1**	**2024 Q2**	**QoQ**	**YoY**
Total Fixed Broadband Subscriber Lines	1,661,534	1,672,278	0.65%	3.18%
Total Fixed Voice (PSTN, ISDN and VOIP) Subscriber lines	1,143,676	1,117,763	-2.27%	-9.53%
Mobile Subscriptions inc. MBB and M2M - Total	9,848,149	9,995,748	1.50%	7.57%
Machine to Machine (M2M) Subscriptions	3,683,536	3,785,067	2.76%	16.48%
Mobile Broadband Subscriptions (HSDPA and LTE)	385,099	383,270	-0.47%	0.12%
Mobile Subscriptions exc. MBB and M2M - Total	5,779,514	5,827,411	0.83%	2.96%
Total FTTP and Cable Coverage	**2024 Q1**	**2024 Q2**	**QoQ**	**YoY**
Percentage Premises with FTTP Broadband Available (Measured by Eircodes)	65%	68%	3%	11%
Percentage Premises with FTTP or Cable Broadband Available (Measured by Eircodes)	78%	81%	3%	8%
FTTP and Cable Take Up Rate	**2024 Q1**	**2024 Q2**	**QoQ**	**YoY**
FTTP Take Up Rate (Measured by Unique Eircodes)	46%	47%	1%	5%
FTTP & Cable Take Up Rate (Measured by Unique Eircodes)	55%	56%	1%	3%

Fixed Market

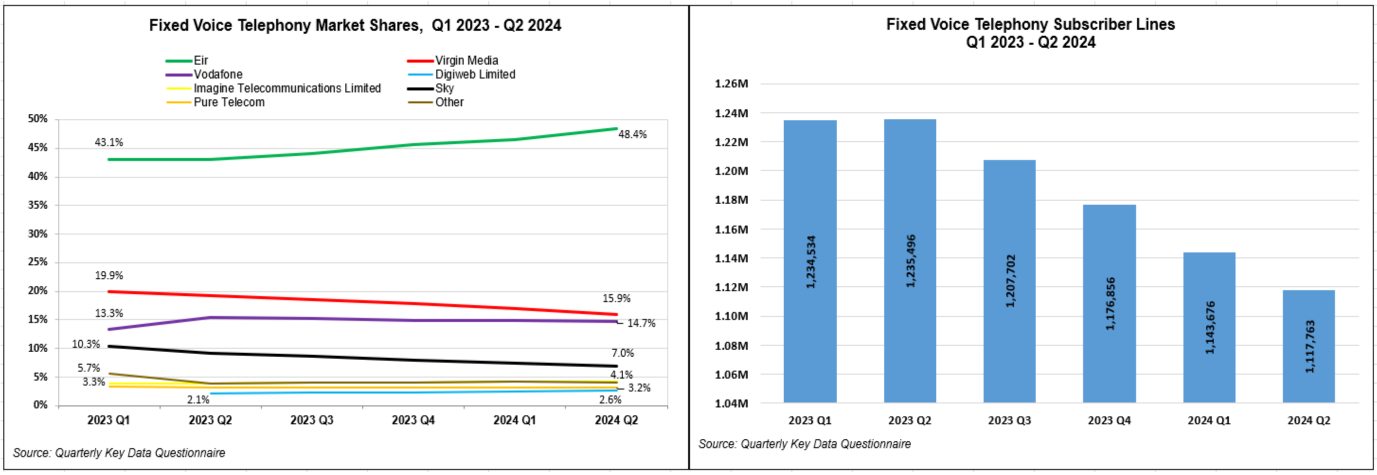
- In Q2 2024, Eir had the highest revenue share (retail and wholesale) in the fixed market at 37.9%.
- ComReg estimates that the next eight largest operators (Virgin Media Ireland, Vodafone (fixed only), BT Ireland, Sky Ireland, E-Net, SIRO, Tetra and Digiweb) contribute a further 46% share of total industry revenue.
- Remaining operators account for the residual 16.1% 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 2024 was around 262 million minutes, which was a 7% decrease on Q1 2024 and a decrease of 18% since Q2 2023.

- At the end of Q2 2024, there were 1,117,763 fixed voice subscriber lines (a decrease of 2% since Q1 2024 and a decrease of 10% on Q2 2023).
- As of Q2 2024, Eir had 48.4% of all fixed voice subscriber lines followed by Virgin Media (15.9%), Vodafone (14.7%), Sky (7%), Imagine Telecommunications Limited (4.1%), Pure Telecom (3.2%) and Digiweb (2.6%). Other operators accounted for the remaining 4.1% of fixed voice subscriber lines.

4. Retail Broadband Market

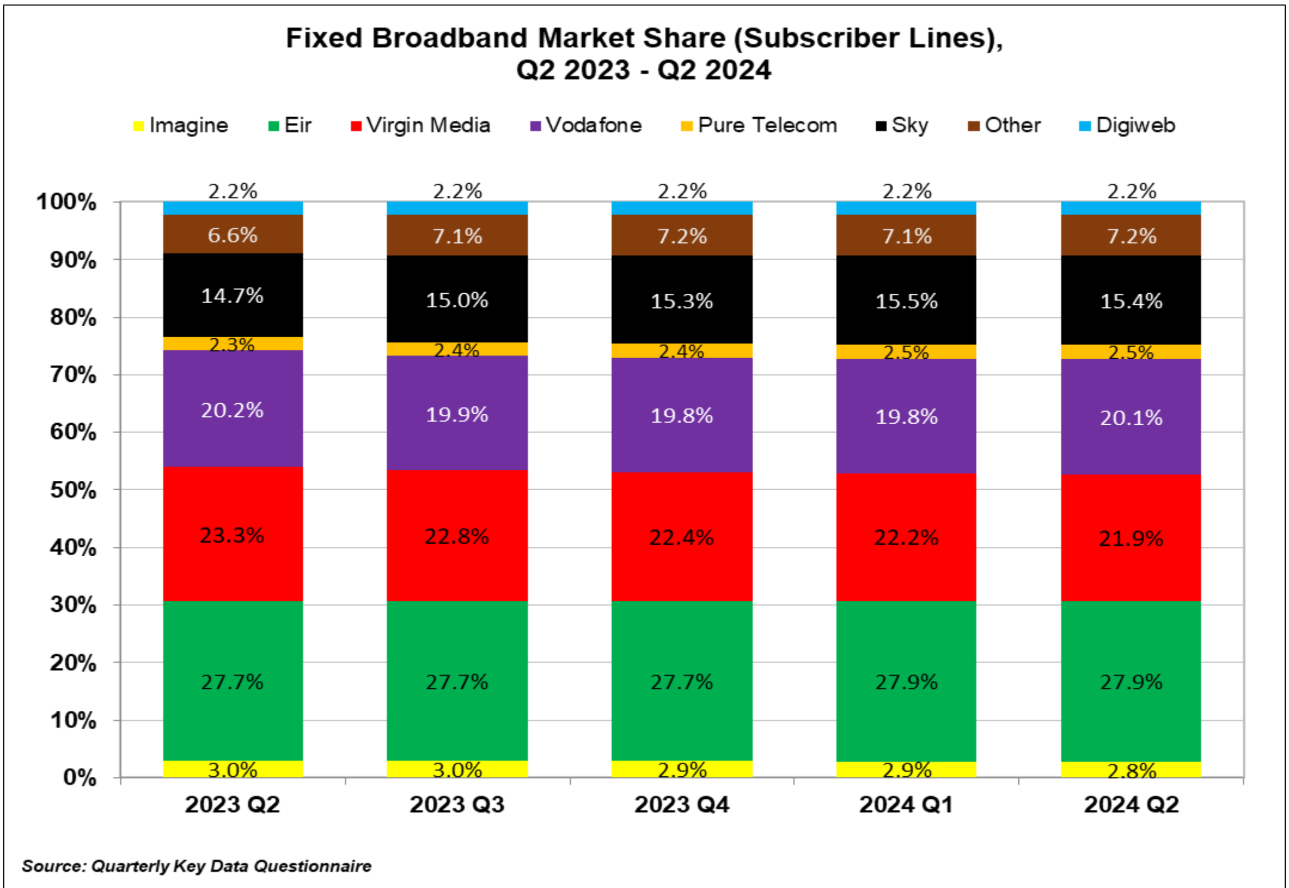
At the end of June 2024, there were over 2 million active total Broadband subscriber lines in Ireland. This is a 0.44% increase from the previous quarter and a 2.60% increase on Q2 2023. Looking at Total Fixed Broadband lines only, these increased by 0.65% since Q1 2024, with a 3.18% annual increase on Q2 2023.

Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q2 2024	Quarterly Change Q1’24 – Q2’24	Annual Change Q2’23 – Q2’24
Cable Broadband	333,772	-2.17%	-7.20%
DSL Broadband	72,361	-9.29%	-28.13%
VDSL Broadband	402,879	-5.78%	-18.36%
FTTP Broadband	763,677	7.17%	32.85%
Satellite Broadband	11,547	18.99%	121.38%
FWA Broadband	88,042	-2.86%	1.39%
Total Fixed Broadband	**1,672,278**	**0.65%**	**3.18%**
Mobile Broadband	383,270	-0.47%	0.12%
Total Broadband	**2,055,548**	**0.44%**	**2.60%**

- FTTP (+7.17%) and Satellite (+18.99%) broadband subscriber lines showed positive growth this quarter. VDSL (-5.78%), DSL (-9.29%), FWA (-2.86%) and Cable (-2.17%) subscriber lines fell this quarter.

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



- In Q2 2024, Eir had 27.9% of total retail fixed who had 21.9% of lines. Vodafone had 20.1% (excluding broadband subscriber lines, followed by Virgin Media mobile broadband), Sky Ireland 15.4%, Imagine 2.8%, Pure Telecom 2.5% and Digiweb 2.2%.

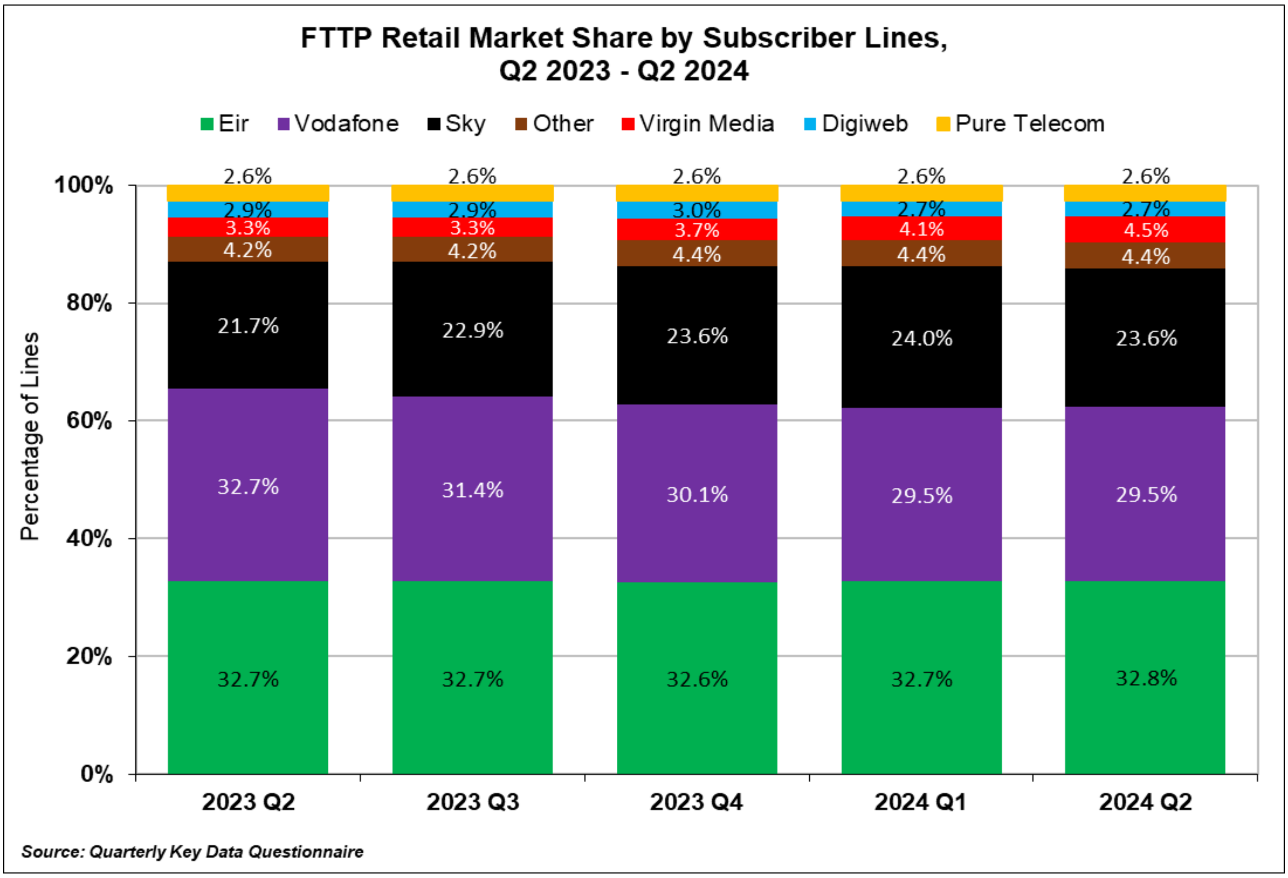
- All other operators combined accounted for the remaining 7.2% share of retail fixed broadband subscriber lines.

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

Fixed Broadband Subscriber Lines by Sold Speed	Q1 2024	Q2 2024	Quarterly Change
<2Mbps - 9.99Mbps	3.01%	2.69%	-0.33%
=10Mbps - 29.99Mbps	4.54%	4.22%	-0.31%
=30Mbps - 99.99Mbps	25.52%	24.04%	-1.49%
=100Mbps - 499.99Mbps	20.20%	19.55%	-0.66%
=500Mbps - 999.99Mbps	34.49%	36.31%	1.81%
>=1GB	12.23%	13.20%	0.97%

- In Q2 2024, 69% of all fixed broadband subscriber lines had sold download speeds which were equal to or greater than 100Mbps, with 49.5% having sold download speeds equal to or greater than 500Mbps - a 2.8% quarter on quarter increase. Those having sold download speeds equal to or greater than 1GB increased by 1% quarter on quarter and stood at 13%.

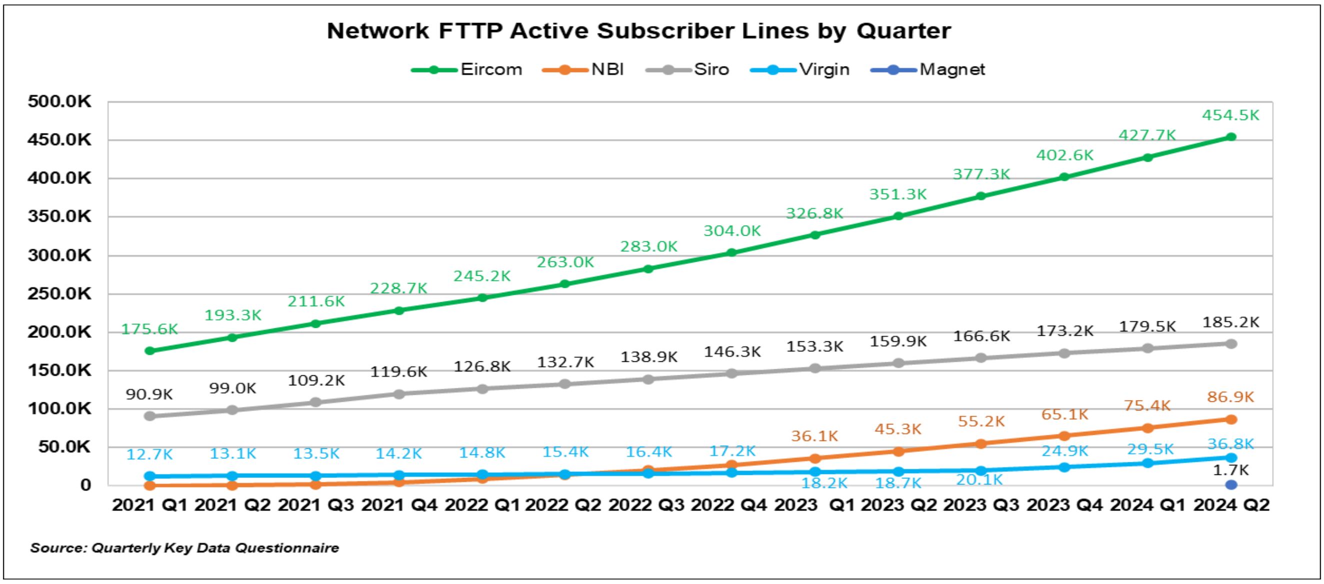
Figure 4 - FTTP Subscriber Line Market Share



- In Q2 2024, Eircom had 32.8% of retail FTTP subscriber lines, followed by Vodafone with 29.5%, Sky Ireland at 23.6%, Virgin Media at 4.5%, Digiweb at 2.7% and Pure Telecom at 2.6%. Other operators accounted for the remaining 4.4%.

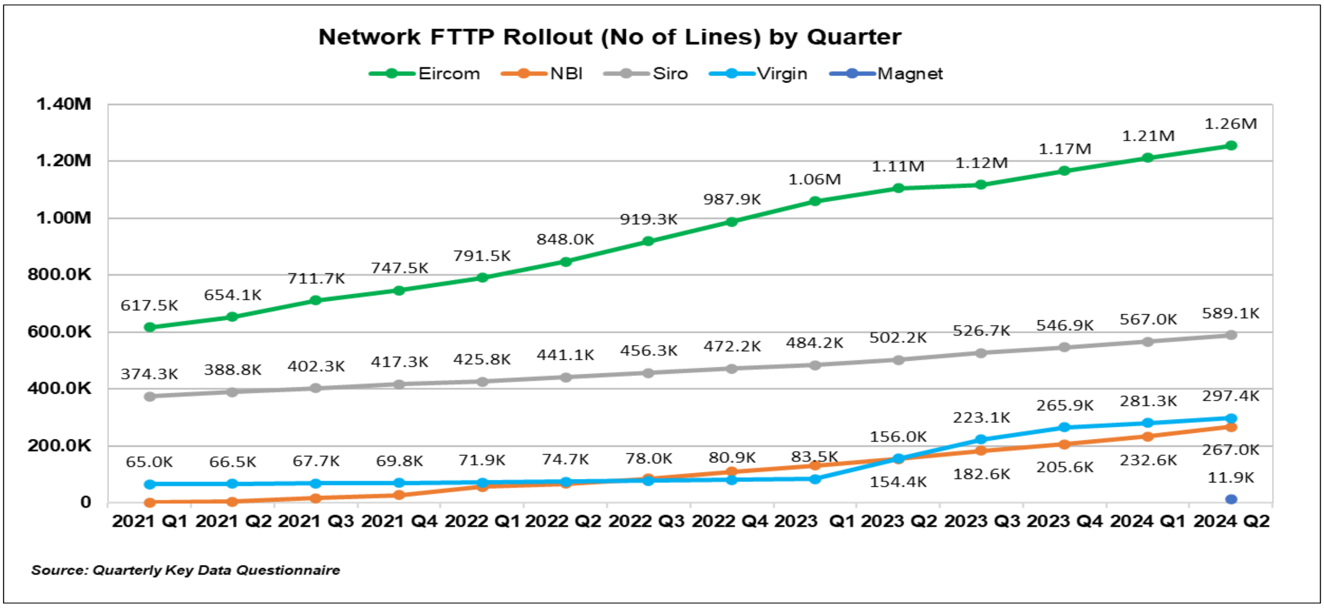
5. Broadband Market Networks

Figure 5 – Network FTTP Active Subscriber Lines by Quarter



- In Q2 2024, based on the underlying network, 454k (up 6% QoQ) of the active FTTP subscriber lines were sold on the Eircom network, 185k (up 3% QoQ) were on the Siro network, 87k (up 15% QoQ) were on the NBI network, 37k (up 25% QoQ) on the Virgin Media network and 1700 on the Magnet Network[1].

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



[1] 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.

- In Q2 2024 Eircom reported having 1.26m (up 4% QoQ) FTTP broadband lines[2], followed by Siro with 589k (up 4% QoQ), Virgin Media Ireland with 297k (up 6% QoQ), NBI with 267k (up 15% QoQ) and Magnet with 12k[3].

Total FTTP and Cable Coverage

- 68% (up 3% QoQ) of all premises (as measured by Eircodes) in Ireland[4] had FTTP broadband available at the end of Q2 2024.

- 81% (up 3% QoQ) of all premises (as measured by Eircodes) in Ireland had FTTP and/or Cable broadband available at the end of Q2 2024.

Total FTTP and Cable Take Up[5]

- In terms of take-up, 47% (up by 1% QoQ) of all premises with FTTP broadband available had an active FTTP service at the end of Q2 2024.

- 56% (up by 1% QoQ) of premises with FTTP or Cable available had an active FTTP or Cable service at the end of Q2 2024.

[2] The Network Operators Eircom, NBI, SIRO, Virgin Media and Magnet 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.

[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 previous years.

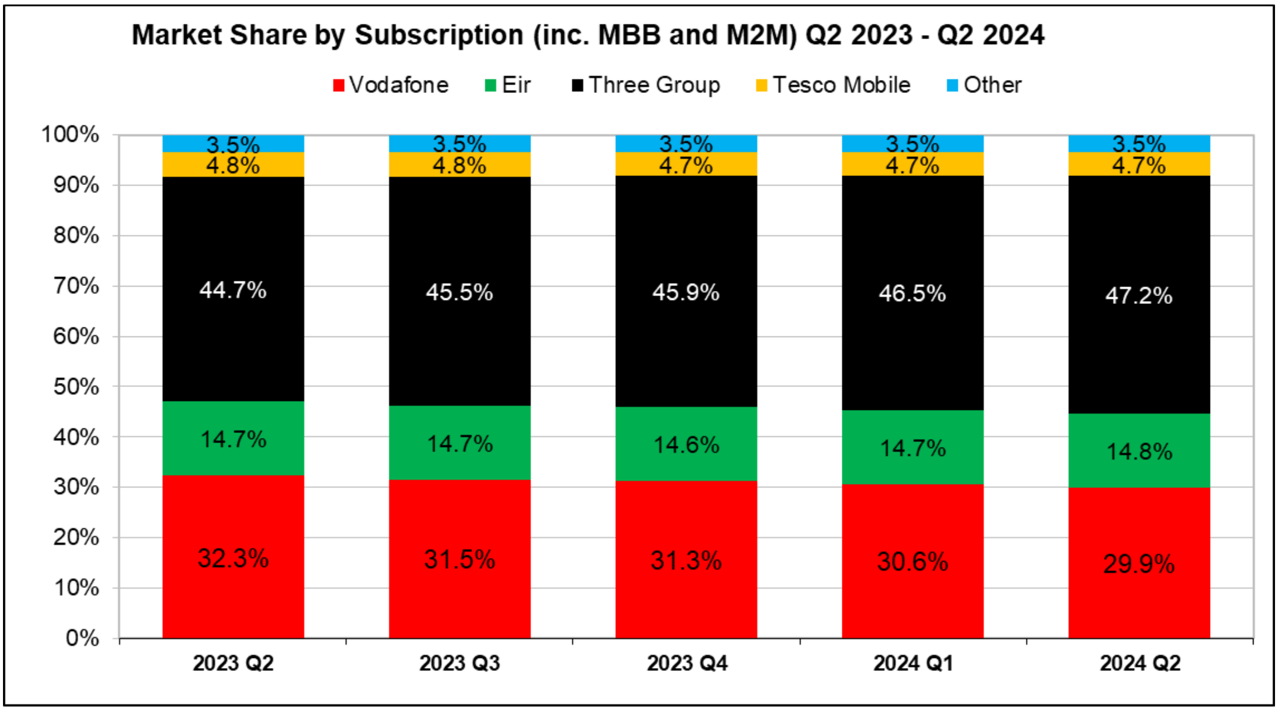
[4] Each Network Operator provides a list of Eircodes associated with each broadband line. ComReg combines all Eircodes and derives a unique coverage figure for each premises by removing instances where Eircodes are passed by more than one network. Each premises (Eircode) which has FTTP and/or Cable 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.

[5] 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’.

6. Mobile Market

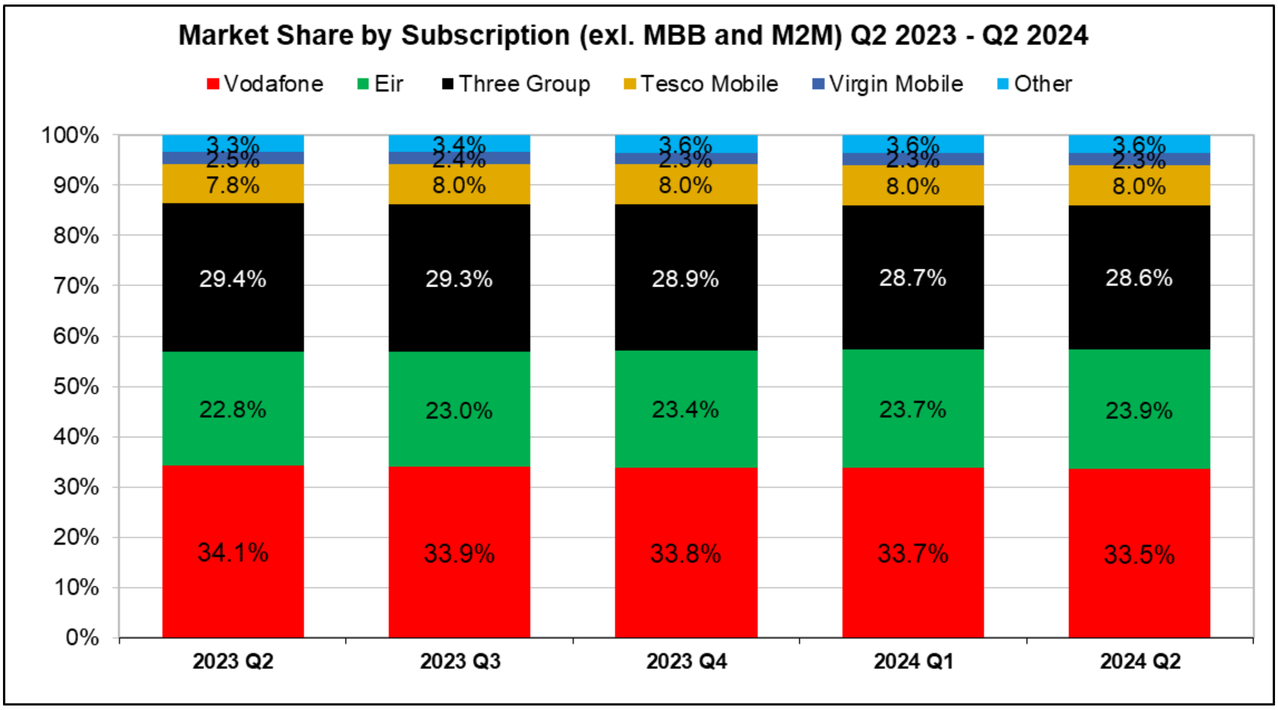
At the end of Q2 2024 there were 9,995,748 mobile subscriptions in Ireland, including mobile broadband ('MBB') and Machine to Machine ('M2M'). If mobile broadband subscriptions (383,270) and M2M subscriptions (3,785,067) are excluded, the total number of mobile voice subscriptions was 5,827,411.

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



- In Q2 2024 Three had the largest share of mobile subscriptions including MBB and M2M at 47.2.%. This was followed by Vodafone with 29.9%, Eir with 14.8%, Tesco Mobile at 4.7% and other operators at 3.5%.

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



- In Q2 2024 Vodafone had the highest market share excluding mobile broadband and M2M (33.5%), followed by Three (28.6%), Eir (23.9%), Tesco Mobile (8.0%), Virgin Mobile (2.3%) and other operators (3.6%).

- There were 2,346,278 2G, 1,231,888 3G, 4,709,289 4G and 1,708,294 5G mobile subscriptions in Q2 2024.

7. Corrigenda and Notes to Q1 2023 – Q1 2024

Note 1: Following concerns raised by ComReg with Vodafone in 2023 regarding its provision of accurate and timely data, Vodafone engaged in an end-to-end review of its mobile (and other) data reporting to ComReg. This was to ensure that Vodafone provides accurate and reliable information, in accordance with statutory obligations. Arising from Vodafone's mobile review (which is now completed), metrics were identified which were incorrectly reported from Q1 2023 to Q1 2024. These metrics have now been revised as per Note 2 – Note 6 below.

Note 2: Vodafone revised On Net Mobile minutes from Q1 2023 to Q1 2024 with revisions ranging from +307 million minutes to +459 million minutes. This has impacted Total Mobile Voice Minutes and Total Voice Traffic Minutes.

Note 3: Vodafone revised Mobile to Fixed minutes from Q1 2023 to Q1 2024 with revisions ranging from +55 million minutes to +88 million minutes. This has impacted Mobile to Fixed Minutes, Total Voice Traffic Minutes and Total Mobile Voice Minutes.

Note 4: Vodafone revised Mobile Outgoing International Minutes from Q1 2023 to Q2 2024 with revisions ranging from 39 million minutes to 48.5 million minutes. This has impacted Total Mobile Voice Minutes and Total Voice Traffic Minutes.

Note 5: Vodafone revised SMS volumes from Q1 2023 to Q1 2024 with revisions ranging from 7 million SMS volumes to 193 million SMS volumes. This has impacted Mobile SMS Traffic and SMS/MMS volumes per subscriber.

Note 6: Vodafone revised MMS volumes from Q1 2023 to Q1 2024 with revisions ranging from -4k MMS volumes to +853k minutes. This has impacted Mobile MMS Traffic and SMS/MMS per traffic.

Note 7: Eir revised Off-Net Mobile minutes for Q1 2024 with revisions totalling 3.3 million minutes. This has impacted Mobile to Mobile Off-Net Minutes, Total Mobile Voice Minutes and Total Voice Traffic Minutes.

Note 8: Eir revised MMS Volumes for Q1 2024 with revisions totalling 373k. This has impacted Mobile MMS Traffic and SMS/MMS per traffic.

Note 9: Eir data for Mobile Broadband ARPU is estimated for Q2 2024.

Note 10: Three revised Fixed Voice lines figures for Q1 2024.

Note 11: Blacknight revised revenue figures for Q1 2023 – Q4 2023. This impacted Wholesale Revenue.

Note 12: Regional Broadband recategorised FTTP and VDSL line figures for Q3 2023 and Q4 2023.

Note 13: Eir revised Fixed Call Origination minutes for Q4 2023 to Q1 2024 with revisions ranging from 2.4 million minutes to 10 million minutes. This has impacted Fixed Voice Traffic and Total Voice Traffic Minutes.

Note 14: Magnet revised their Broadband data traffic volumes for Q1 2024. This impacted total Data Traffic volumes.

Note 15: Magnet revised their Retail revenue for Q4 2023. This impacted total Retail Revenue.

8. 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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