An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q3 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, 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 July 2024 to 30th September 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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- Retail Broadband Market
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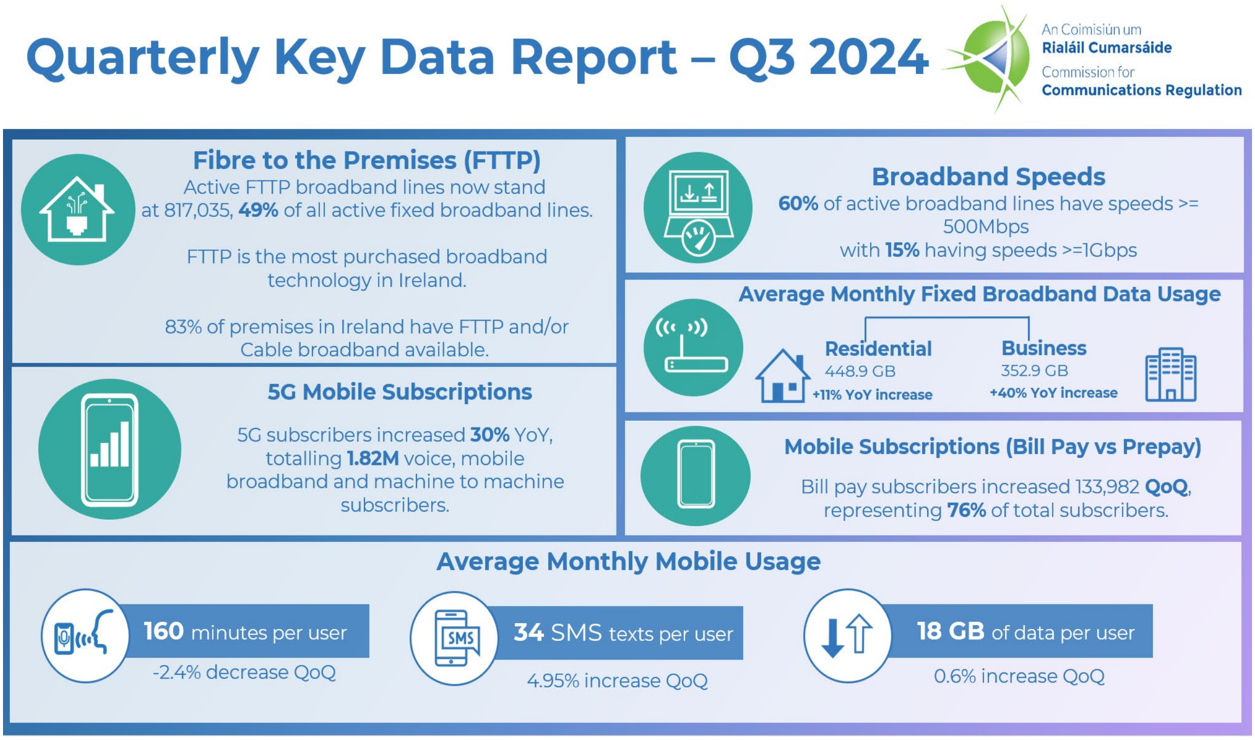
2. Q3 2024 Infographic



3. Overview of Irish Communications Market Q3 2024

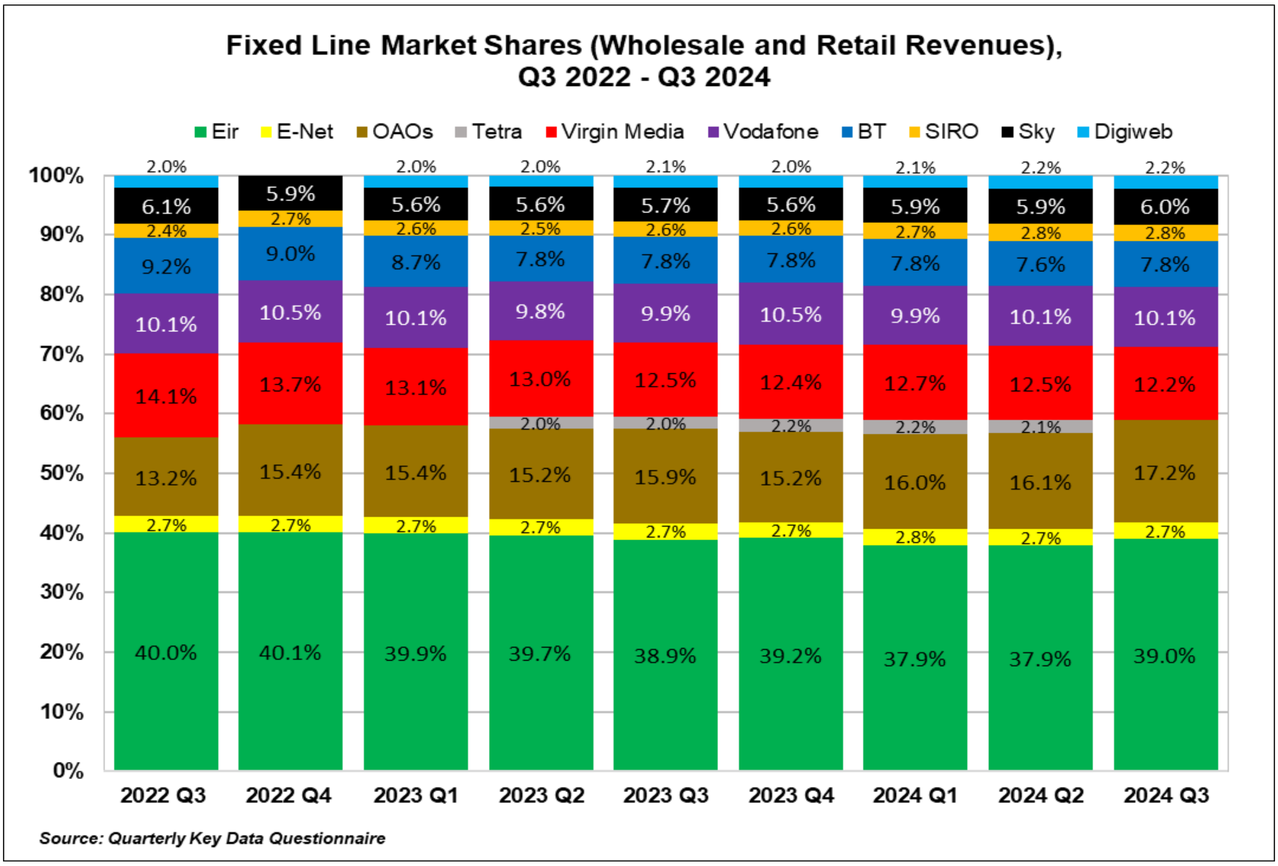
Table 1 - Communications Summary

Revenues	2024 Q2	2024 Q3	QoQ	YoY
Total Retail Market Revenues (000s)	€924,568	€927,997	0.37%	1.19%
Total Fixed Line Wholesale Revenues (000's)	€159,363	€158,251	-0.70%	1.22%
Total Mobile Wholesale revenues (000's)	€31,975	€30,950	-3.20%	-16.60%
Total FTTP and Cable Coverage	**2024 Q2**	**2024 Q3**	**QoQ**	**YoY**
Percentage Premises with FTTP Broadband Available (Measured by Eircodes)	68%	71%	3%	11%
Percentage Premises with FTTP or Cable Broadband Available (Measured by Eircodes)	81%	83%	2%	8%
FTTP and Cable Take Up Rate	**2024 Q2**	**2024 Q3**	**QoQ**	**YoY**
FTTP Take Up Rate (Measured by Unique Eircodes)	47%	48%	1%	5%
FTTP & Cable Take Up Rate (Measured by Unique Eircodes)	56%	57%	1%	3%
Subscriber Lines	**2024 Q2**	**2024 Q3**	**QoQ**	**YoY**
Total Fixed Broadband Subscriber Lines	1,672,278	1,683,200	0.65%	2.68%
Total Fixed Voice (PSTN, ISDN and VOIP) Subscriber lines	1,117,763	1,105,730	-1.08%	-8.44%
Mobile Subscriptions inc. MBB and M2M - Total	9,995,748	10,145,572	1.50%	6.43%
Machine to Machine (M2M) Subscriptions	3,785,067	3,871,056	2.27%	13.48%
Mobile Broadband Subscriptions	383,270	394,408	2.91%	2.74%
Mobile Subscriptions exc. MBB and M2M - Total	5,827,411	5,880,108	0.90%	2.49%
Voice Traffic	**2024 Q2**	**2024 Q3**	**QoQ**	**YoY**
Total Voice Traffic Minutes (000s)	3,133,384	3,062,834	-2.25%	-4.16%
Total Fixed Voice Minutes (000's)	262,622	246,490	-6.14%	-19.83%
Total Mobile Voice Minutes (000's)	2,870,762	2,816,344	-1.90%	-2.50%

Fixed Market

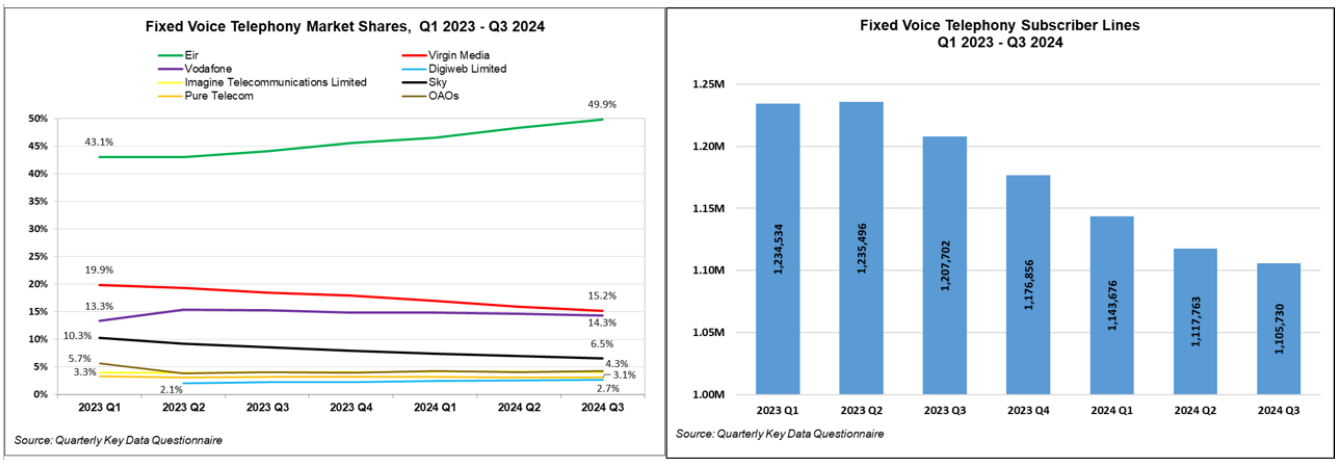
- In Q3 2024, Eir had the highest revenue share (retail and wholesale) in the fixed market at 39%.
- ComReg estimates that the next seven largest operators (Virgin Media Ireland, Vodafone (fixed only), BT Ireland, Sky Ireland, E-Net, SIRO and Digiweb) contribute a further 43.8% share of total industry revenue.
- Remaining operators (OAO's) account for the residual 17.2% share.

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



Retail Fixed Voice Market

Figure 2 – Retail Fixed Voice Subscriber Lines



- Fixed voice traffic in Q3 2024 was around 246 million minutes, which was a 6% decrease on Q2 2024 and a decrease of 20% since Q3 2023.

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[1] Tetra fell below 2% market share in Q3 2024 and is now included in the OAO category.

- At the end of Q3 2024, there were 1,105,730 fixed voice subscriber lines (a decrease of 1% since Q2 2024 and a decrease of 8% on Q3 2023).
- As of Q3 2024, Eir had 49.9% of all fixed voice subscriber lines followed by Virgin Media (15.2%), Vodafone (14.3%), Sky (6.5%), Imagine Telecommunications Limited (4%), Pure Telecom (3.1%) and Digiweb (2.7%). Other operators accounted for the remaining 4.3% of fixed voice subscriber lines.

4. Retail Broadband Market

At the end of September 2024, there were over 2 million active total Broadband subscriber lines in Ireland. This is a 1.1% increase from the previous quarter and a 2.7% increase on Q3 2023. Looking at total Fixed Broadband lines only, these increased by 0.7% since Q2 2024, with a 2.7% annual increase on Q3 2023.

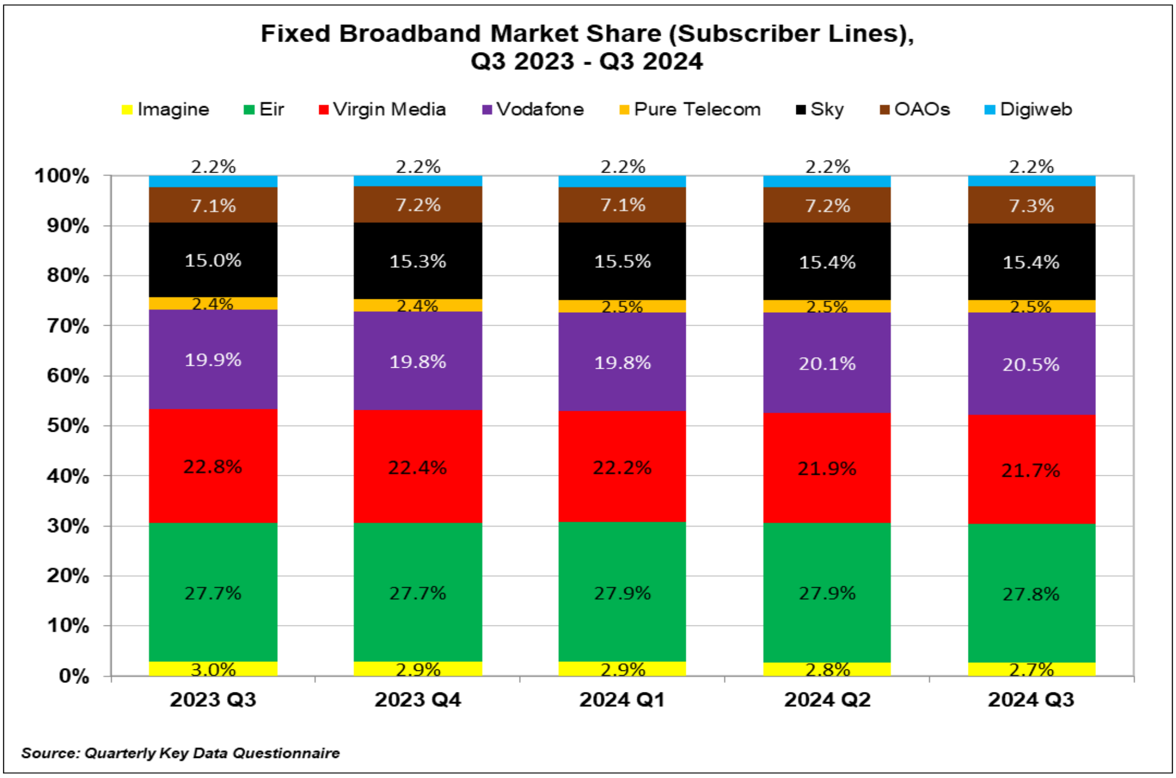
Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q3 2024	Quarterly Change Q2'24 – Q3'24	Annual Change Q3'23 – Q3'24
Cable Broadband	325,847	-2.37%	-7.93%
DSL Broadband	67,228	-7.09%	-28.27%
VDSL Broadband	374,918	-6.94%	-20.46%
FTTP Broadband	817,035	6.99%	31.81%
Satellite Broadband	13,273	14.95%	99.62%
FWA Broadband	84,899	-3.57%	-9.49%
Total Fixed Broadband	**1,683,200**	**0.65%**	**2.68%**
Mobile Broadband	394,408	2.91%	2.74%
Total Broadband	**2,077,608**	**1.07%**	**2.69%**

- FTTP[2] (+7%), Satellite (+15%) and Mobile (+3%) broadband subscriber lines showed positive growth this quarter. VDSL (-7%), DSL (-7.1%), FWA[3] (-3.6%) and Cable (-2.4%) subscriber lines fell this quarter.

[2] Fibre to the Premises
[3] Fixed Wireless Access

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



- In Q3 2024, Eir had 27.8% of total retail fixed broadband subscriber lines, followed by Virgin Media at 21.7%, Vodafone had 20.5%, Sky Ireland 15.4%, Imagine 2.7%, Pure Telecom 2.5% and Digiweb 2.2%.

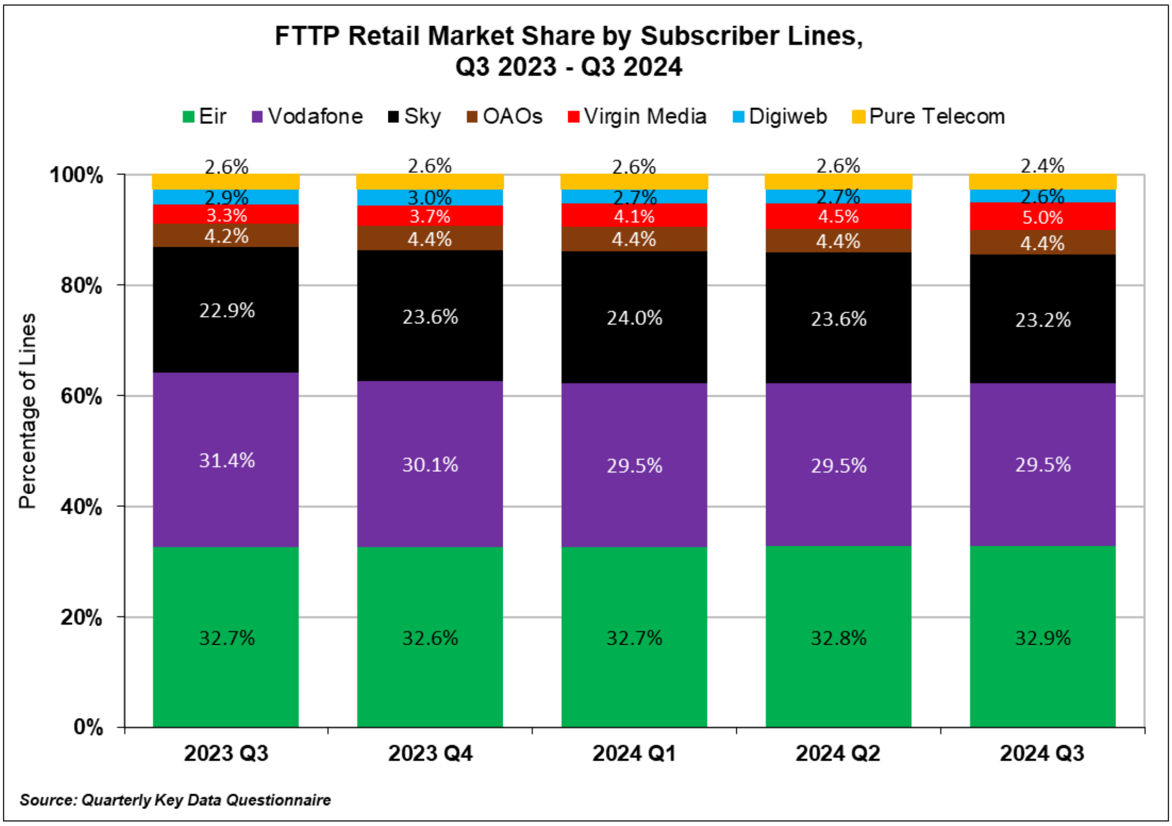
- All other operators (OAO's) combined accounted for the remaining 7.3% share of retail fixed broadband subscriber lines.

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

Fixed Broadband Subscriber Lines by Sold Speed	Q2 2024	Q3 2024	Quarterly Change
<2Mbps - 9.99Mbps	2.69%	2.51%	-0.17%
=10Mbps - 29.99Mbps	4.22%	3.82%	-0.41%
=30Mbps - 99.99Mbps	24.04%	22.13%	-1.91%
=100Mbps - 499.99Mbps	19.55%	12.17%	-7.38%
=500Mbps - 999.99Mbps	36.31%	44.88%	8.58%
>=1GB	13.20%	14.49%	1.29%

- In Q3 2024, 71.5% of all fixed broadband subscriber lines had sold download speeds which were equal to or greater than 100Mbps, with 59.4% having sold download speeds equal to or greater than 500Mbps, a 9.9% quarter on quarter increase. Those having sold download speeds equal to or greater than 1GB increased by 1.3% quarter on quarter and stood at 14.5%.

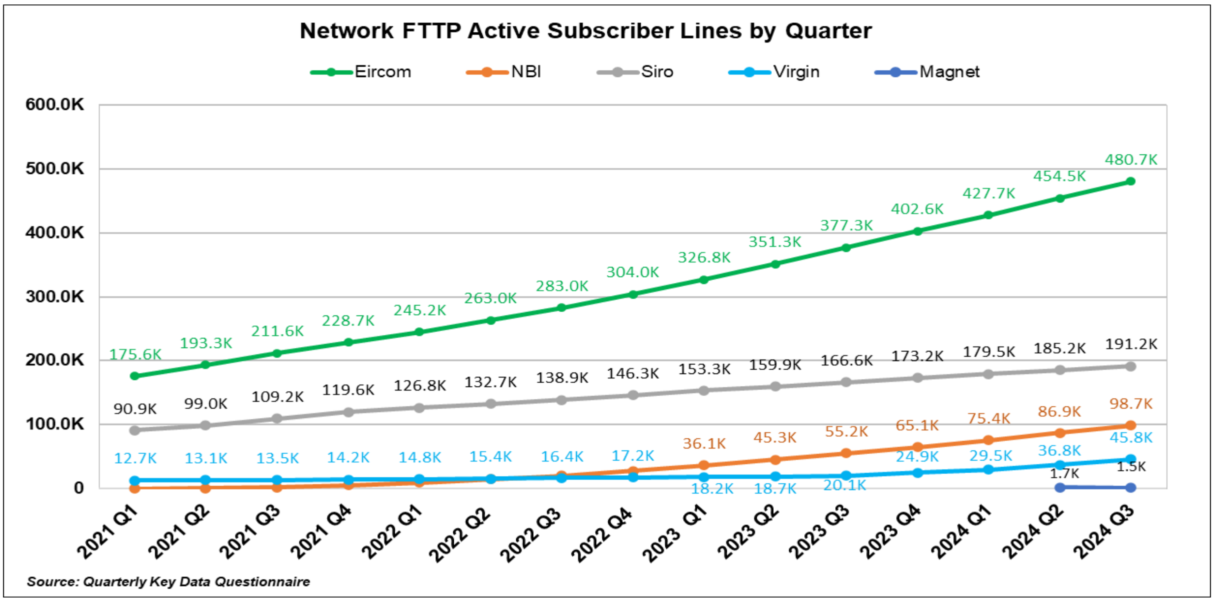
Figure 4 - FTTP Subscriber Line Market Share



- In Q3 2024, Eircom had 32.9% of retail Fibre to the Premises (FTTP) subscriber lines, followed by Vodafone with 29.5%, Sky Ireland at 23.2%, Virgin Media at 5%, Digiweb at 2.6% and Pure Telecom at 2.4%. Other operators accounted for the remaining 4.4%.

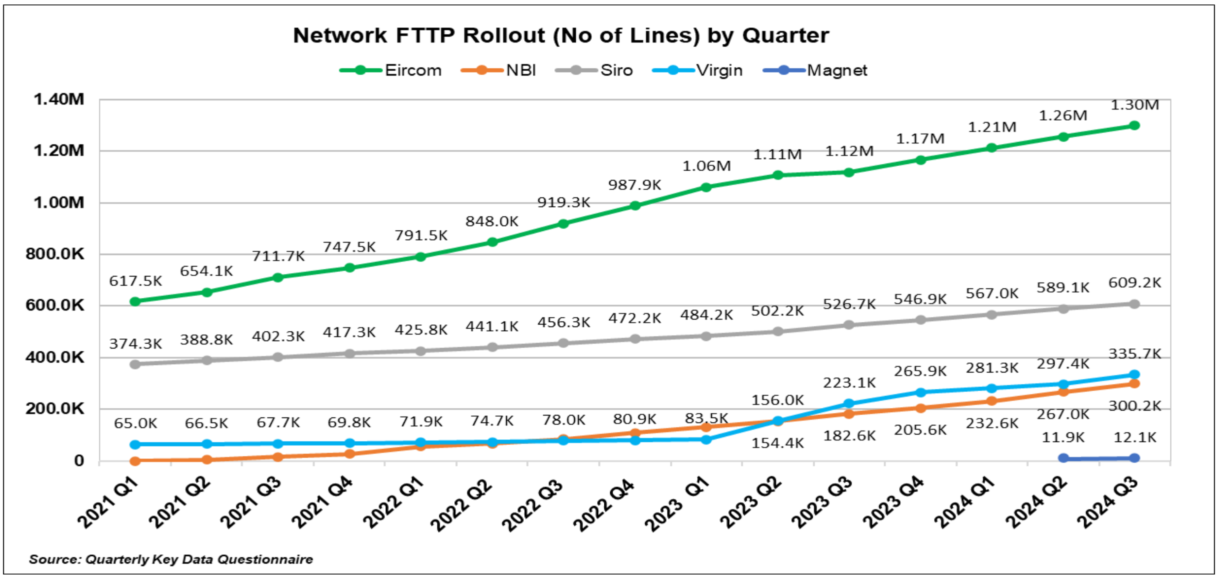
5. Broadband Market - Networks

Figure 5 – Network FTTP Active Subscriber Lines by Quarter



- In Q3 2024, based on the underlying network, 481k (up 6% QoQ) of the active FTTP subscriber lines were sold on the Eircom network, 191k (up 3% QoQ) were on the Siro network, 99k (up 14% QoQ) were on the NBI network, 46k (up 24% QoQ) were on the Virgin Media network and 1.5k were on the Magnet Network[4].

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



[4] 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 Q3 2024, Eircom reported having 1.29m (up 3% QoQ) FTTP broadband lines[5], followed by Siro with 609k (up 3% QoQ), Virgin Media Ireland with 335k (up 6% QoQ), NBI with 300k (up 12% QoQ) and Magnet with 12k[6].

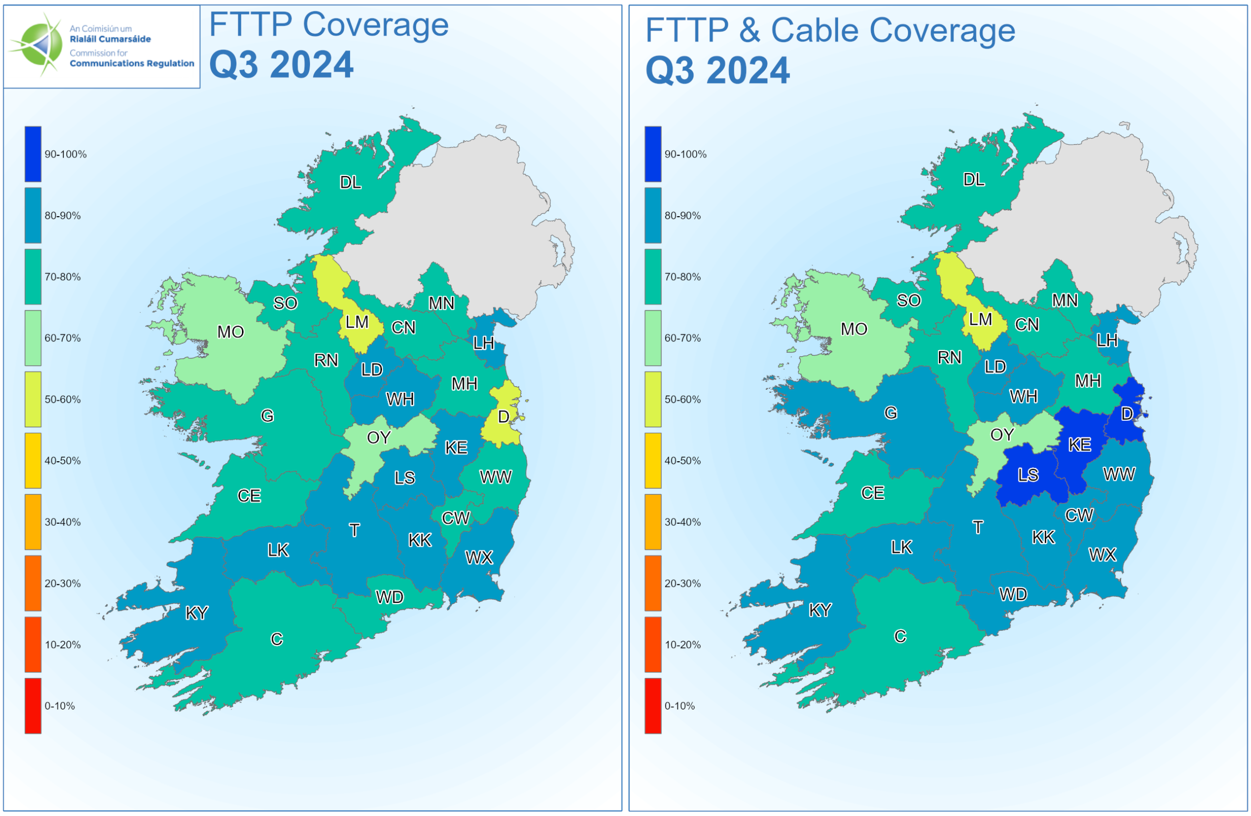
Total FTTP and Cable Coverage

- 71% (up 3 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland[7] had FTTP broadband available at the end of Q3 2024.
- 83% (up 2 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland had FTTP and/or Cable broadband available at the end of Q3 2024.
- The maps set out below show County level 'FTTP' and 'FTTP and/or Cable' Coverage for Q3 2024.
- The County with the highest level of FTTP coverage is Laois at 89%, Dublin has the highest level of FTTP and/or Cable coverage at 92%.
- Leitrim has the fastest growing FTTP coverage within the last year, with a 29 percentage point increase in FTTP coverage compared to Q3 2023.

[5] 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.

[6] 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.

[7] 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.



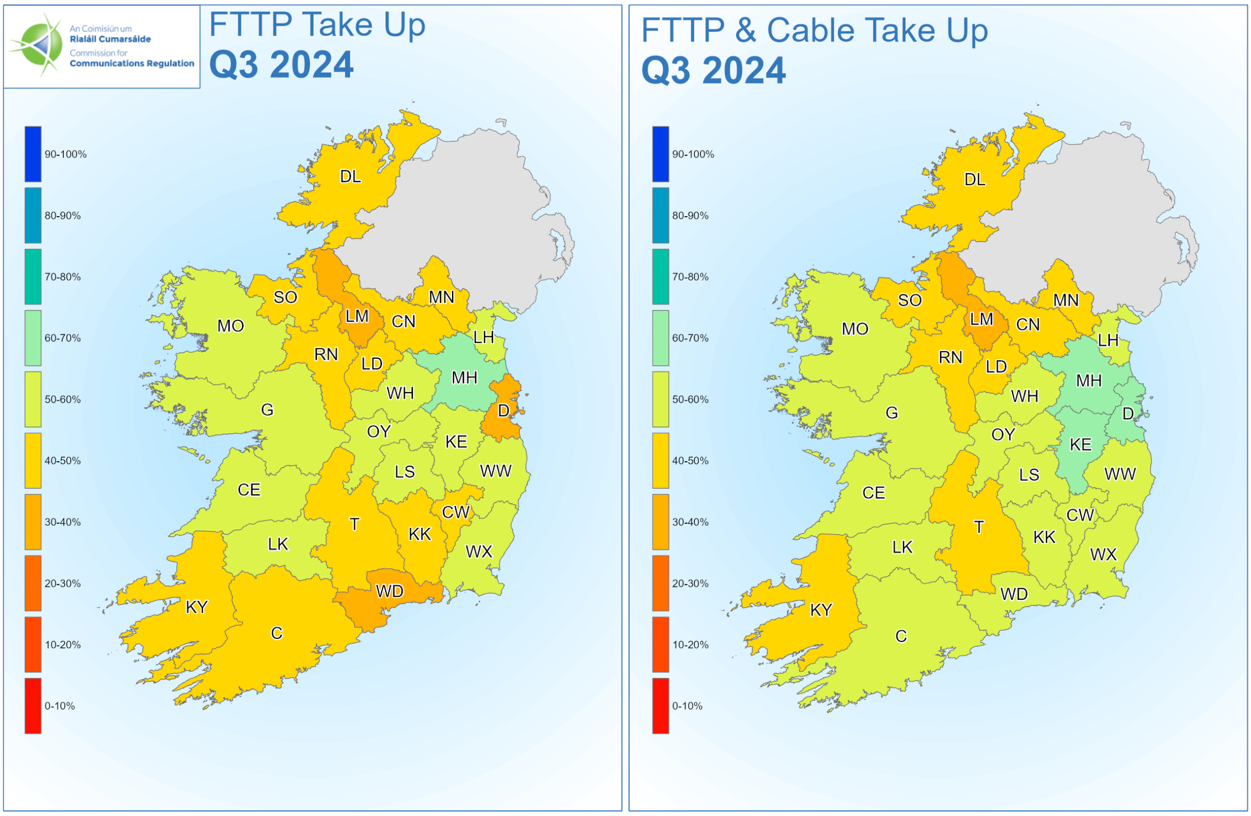
Code	County	Code	County	Code	County	Code	County	Code	County	Code	County	Code	County	Code	County	Code	County
C	Cork	CW	Carlow	G	Galway	KY	Kerry	LK	Limerick	MH	Meath	OY	Offaly	T	Tipperary	WW	Wicklow
CE	Clare	D	Dublin	KE	Kildare	LD	Longford	LM	Leitrim	MN	Monaghan	RN	Roscommon	WD	Waterford	WX	Wexford
CN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

Total FTTP and Cable Take-Up[8]

- In terms of FTTP take-up (active premises divided by premises where FTTP is available), 48% (up by 1 percentage point QoQ) of all premises with FTTP broadband available had an active FTTP service at the end of Q3 2024.
- 57% (up by 1 percentage point QoQ) of premises with FTTP or Cable available had an active FTTP or Cable service at the end of Q3 2024.
- The maps set out below show County level 'FTTP' and 'FTTP or Cable' take-up rate by County for Q3 2024[9].
- The County with the highest level of FTTP take-up is Meath at 61%.
- Waterford has the fastest growing FTTP take-up rate within the last year, with a 9 percentage point increase in take-up compared to Q3 2023.

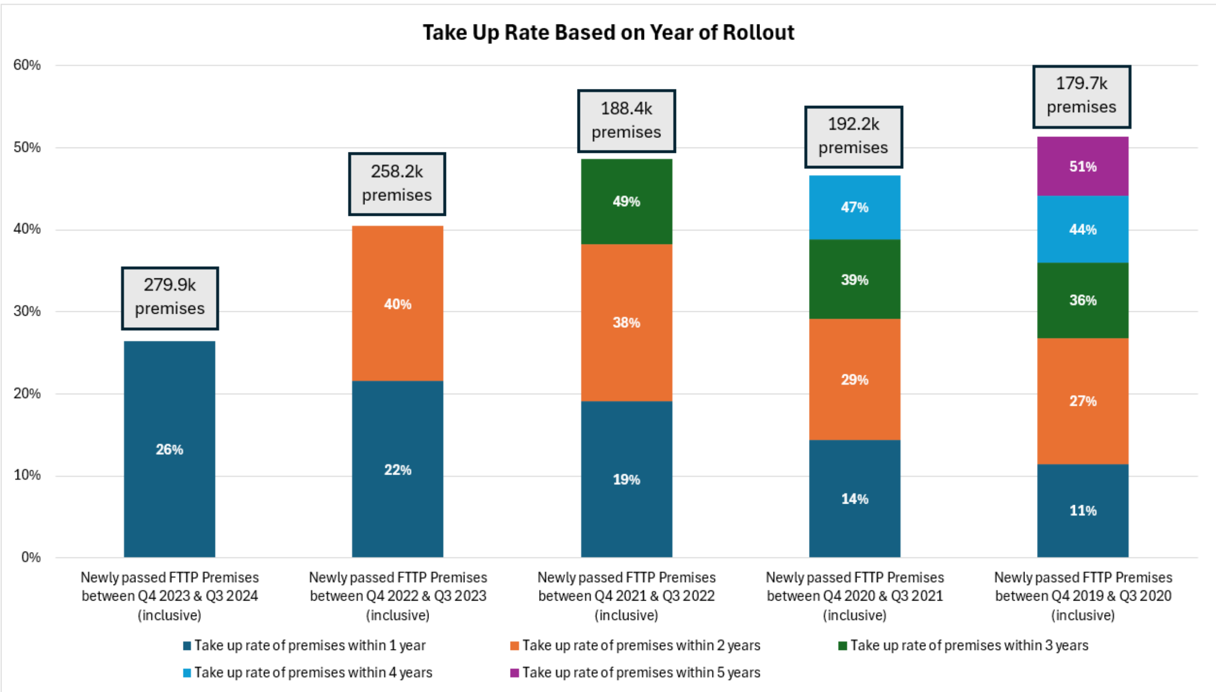
[8] This metric is based on the total number of active FTTP premises where a unique active figure is derived for each premises (as measured by Eircodes). This removes instances where a single premises (e.g. a business) has multiple lines at the premises. This active FTTP premises figure is then divided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

[9] Full tabular data and map visualisations for 'FTTP' and 'FTTP and/or Cable' Coverage and Take-Up statistics by County by Quarter can be found at ComReg's Data Portal



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

Figure 7 - FTTP Take-Up Based on Year of Rollout



- Each bar in this graph shows the FTTP take-up rate over time of a different batch of premises, with the batches set according to specific yearly 12-month periods ('time slices') within which

FTTP was rolled out. The grey label above each bar represents the number of premises in that batch.

- Each yearly batch captures FTTP roll-out occurring over 4 quarters (Q4, Q1, Q2 and Q3) for the relevant year, and then tracks what happens to the take-up for these same specific premises over subsequent years.

- For example, the bar on the right shows the take-up rates over time of the 179.7k premises which were passed with FTTP between Q4 2019 and Q3 2020 (inclusive). 11% was the take-up rate of these specific 179.7k premises within 1 year (as at Q3 2020), 27% was the take-up of these same 179.7k premises within 2 years (as at Q3 2021), etc., up to 51% take-up for this specific batch of premises within 5 years (as at Q3 2024). Similarly, for the 258.2k premises passed with FTTP in the period Q4 2022 to Q3 2023, the take-up rate within 1 year (as at Q3 2023) was 22%, rising to 40% within 2 years (as at Q3 2024).

- The time slices measuring take-up rates are comparable across the bars. For example, the dark blue segment of a bar is the take-up rate within 1 year for that specific batch of premises, the orange segment of a bar is the take-up within 2 years for that specific batch of premises, etc.

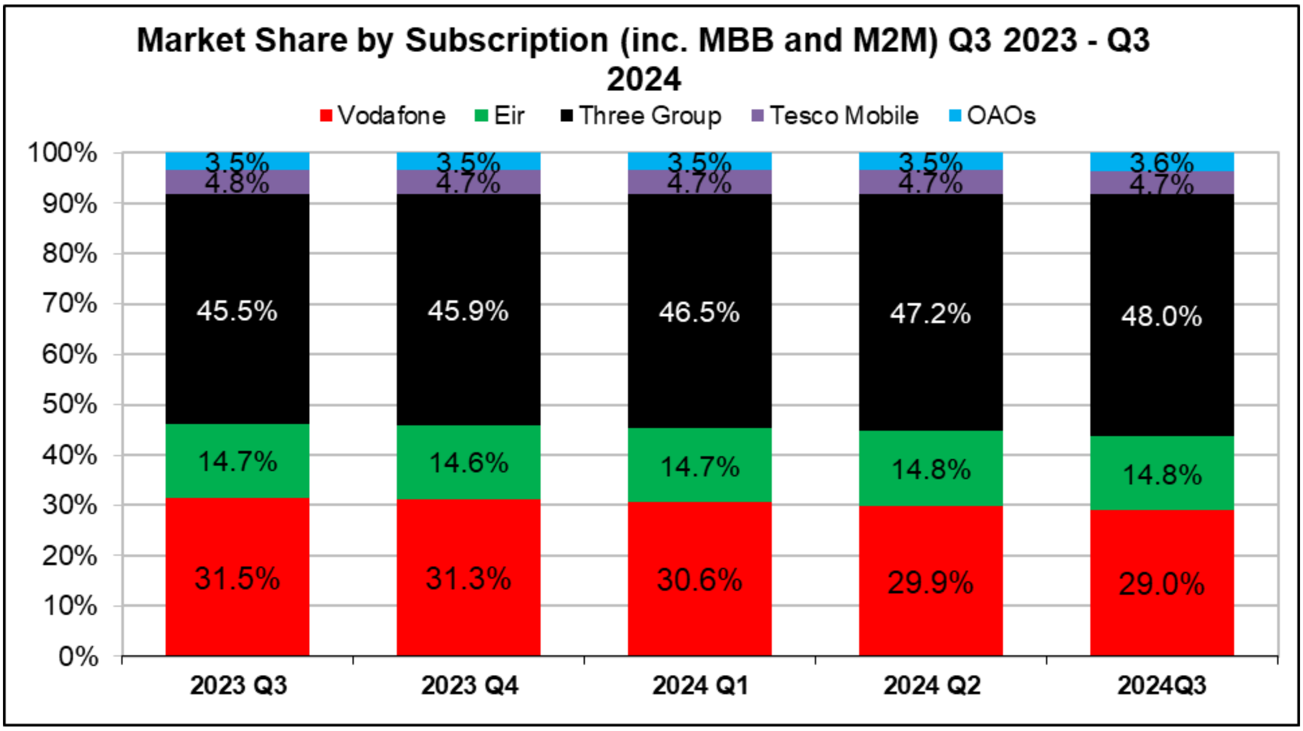
- The trend in the graph amongst the Q3 2024 take-up rates of each of the batches (which is the percentage figure at the top of each bar) highlights that older FTTP deployments have higher take-up than newer FTTP deployments.

- The take-up rate within 1 year and within 2 years is higher for newer deployments than older deployments, and these rates are consistently increasing as evidenced by the dark blue and orange segments of each of the bars. For example, the take-up rate within 1 year was 26% for newly passed premises between Q4 2023 and Q3 2024, which is the highest of all the batches to date.

6. Mobile Market

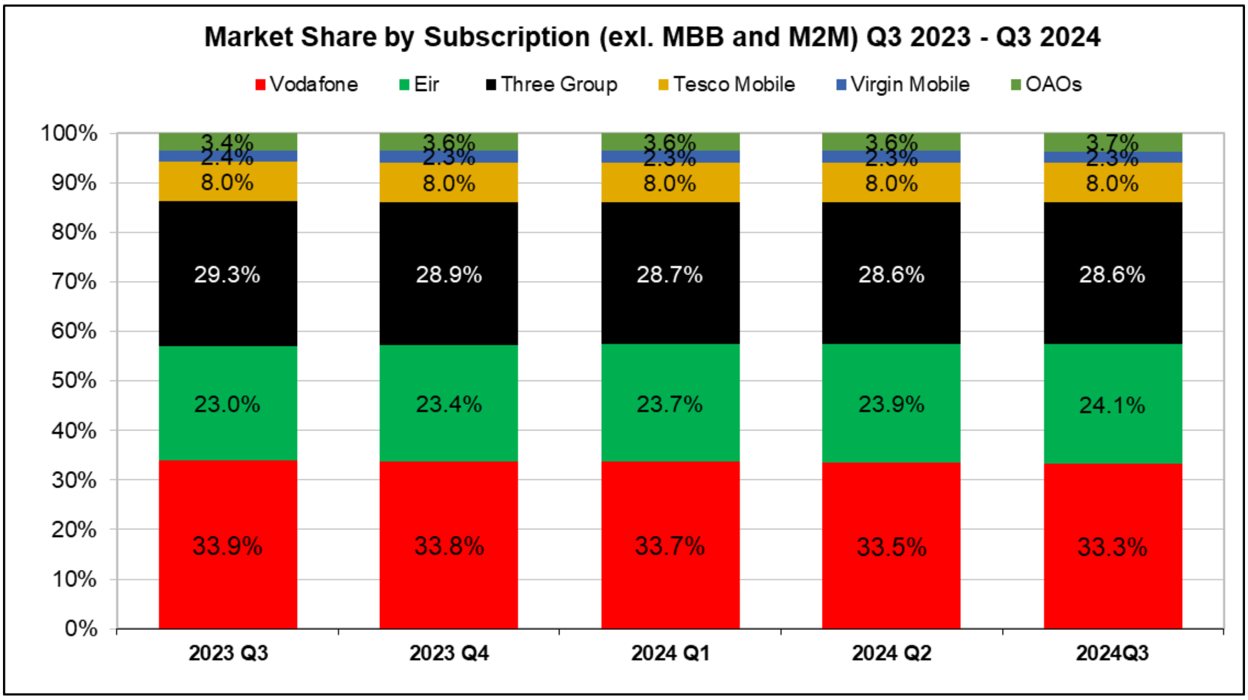
At the end of Q3 2024 there were 10,145,572 mobile subscriptions in Ireland, including mobile broadband (‘MBB’) and Machine to Machine (‘M2M’). If mobile broadband subscriptions (394,408) and M2M subscriptions (3,871,056) are excluded, the total number of mobile voice subscriptions was 5,880,108.

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



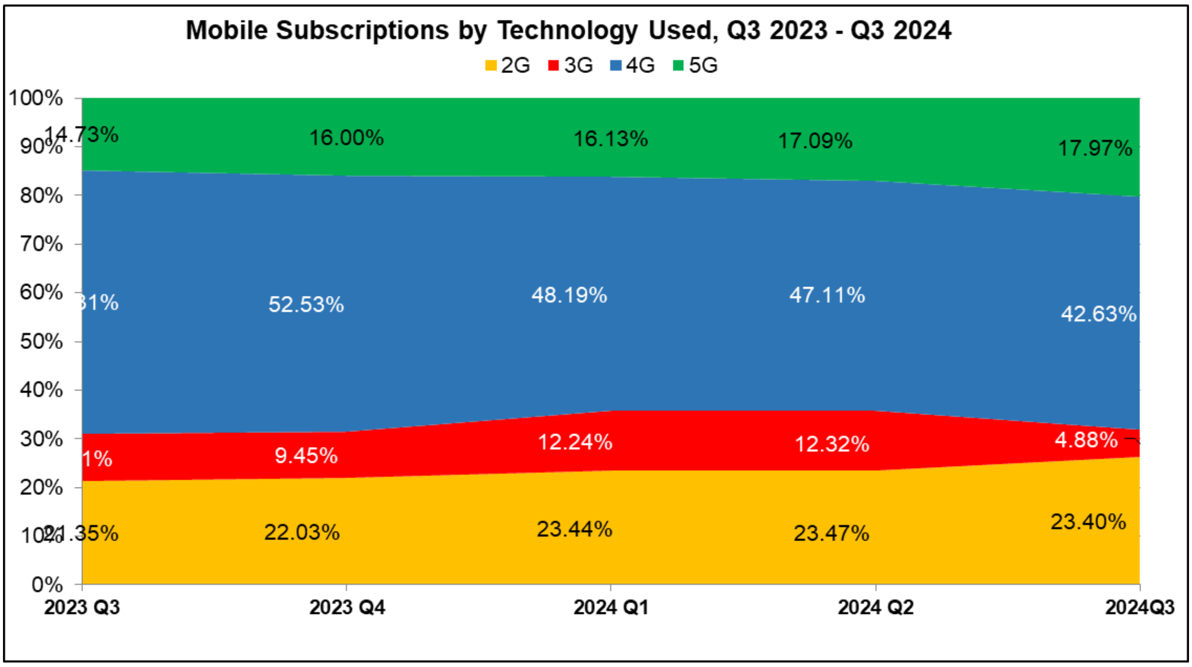
- In Q3 2024 Three had the largest share of mobile subscriptions including MBB and M2M at 48%. This was followed by Vodafone with 29%, Eir with 14.8%, Tesco Mobile at 4.7% and other operators at 3.6%.

Figure 9 - Market Shares by Subscription excluding Mobile Broadband and Machine to Machine



- In Q3 2024 Vodafone had the highest market share excluding mobile broadband and M2M (33.3%), followed by Three (28.6%), Eir (24.1%), Tesco Mobile (8.0%), Virgin Mobile (2.3%) and other operators (3.7%).

Figure 10 – Mobile Subscriptions by Technology



- There were 2,374,272 2G (23.40%), 495,192 3G (4.88%), 4,324,567 4G (42.63%) and 1,823,603 5G (17.97%) mobile subscriptions in Q3 2024. 1,127,938 mobile subscriptions did not record any use of data in Q3 2024.

7. Corrigenda and Notes to Q1 2021 – Q2 2024

Note 1: Lycamobile revised Mobile Blended Average Revenue Per User (ARPU) between Q3 2023 and Q2 2024.

Note 2: An Post Mobile revised Mobile Blended Average Revenue Per User (ARPU) between Q3 2023 and Q2 2024.

Note 3: Virgin Media Ireland revised Mobile Blended Average Revenue Per User (ARPU) between Q3 2023 and Q2 2024.

Note 4: Vodafone reallocated mobile revenue categories for Q2 2024.

Note 5: ComReg revised porting figures in Q2 2024.

Note 6: ComReg revised Data per dedicated MBB subscriber (GB) between Q1 2021 – Q2 2024.

Note 7: ComReg revised Data per smartphone (GB) between Q3 2021 – Q2 2024.

Note 8: ComReg "Mobile Voice and Other Revenue" revised, affecting Total Mobile Retail Revenue and Total Retail Market Revenue for Q2 2024.

Note 9: ComReg revised Mobile Phone services ARPU between Q2 2023 – Q2 2024.

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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