An Coimisiún um Rialáil Cumarsáide
Commission for Communications Regulation

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Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q1 2020

QKDR DATA PORTAL

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Reference: ComReg 20/45

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Q1 2020 Key Quarterly Trends

Mobile Data Volumes

Increased by 47% since Q1 2019

Fixed Broadband Traffic

Up 47% since Q1 2019

Fixed and Mobile Voice Minutes

Increased by 9% since Q4 2019

32K Increase in broadband subscriptions

180K Total FTTP broadband subscriptions

9.4G Average mobile data used per subscriber per month usage

26% Increase in fixed broadband data usage volumes

Mobile retail revenues increased by 0.7% this quarter

Background

ComReg collects statistical data from authorised operators on a quarterly basis. Not all operators are included in this data collection but ComReg aims to represent 95% of the total market. This data includes information on subscriptions, revenue, 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.

Please note that from Q1 2020 the design of the Quarterly Key Data Report has been updated. The data that has been removed from this report, along with the data in the report are all available on the data portal www.comreg.ie/industry/electronic-communications/data-portal .

Data presented in this Summary of the Quarterly Key Data is based on questionnaires completed by certain authorised operators for the period from 1st January 2020 to 31st March 2020. The report is based on submissions from 45 active operators.

The report contains the following key charts/data

- Overview of Market
  - Table 1 - Communications Summary
- Fixed Market
  - Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue
- Fixed Voice
  - Figure 2 - Fixed Voice Subscriptions
- Broadband Market
  - Table 2 - Total Number of Active Broadband Subscriptions
  - Figure 3 - Fixed Broadband Market Shares based on Subscriptions
  - Table 3 - Fixed Broadband Subscriptions by Sold Speed
  - Figure 4 - FTTP Subscription Market Share
- Mobile Market
  - Figure 5 - Market Share by Subscription including Mobile Broadband (MBB) and Machine to Machine (M2M)
  - Figure 6 - Market Share by Subscription excluding Mobile Broadband (MBB) and Machine to Machine (M2M)
- Corrigendum
- Memorandum

Overview of Irish Communications Market Q1 2020

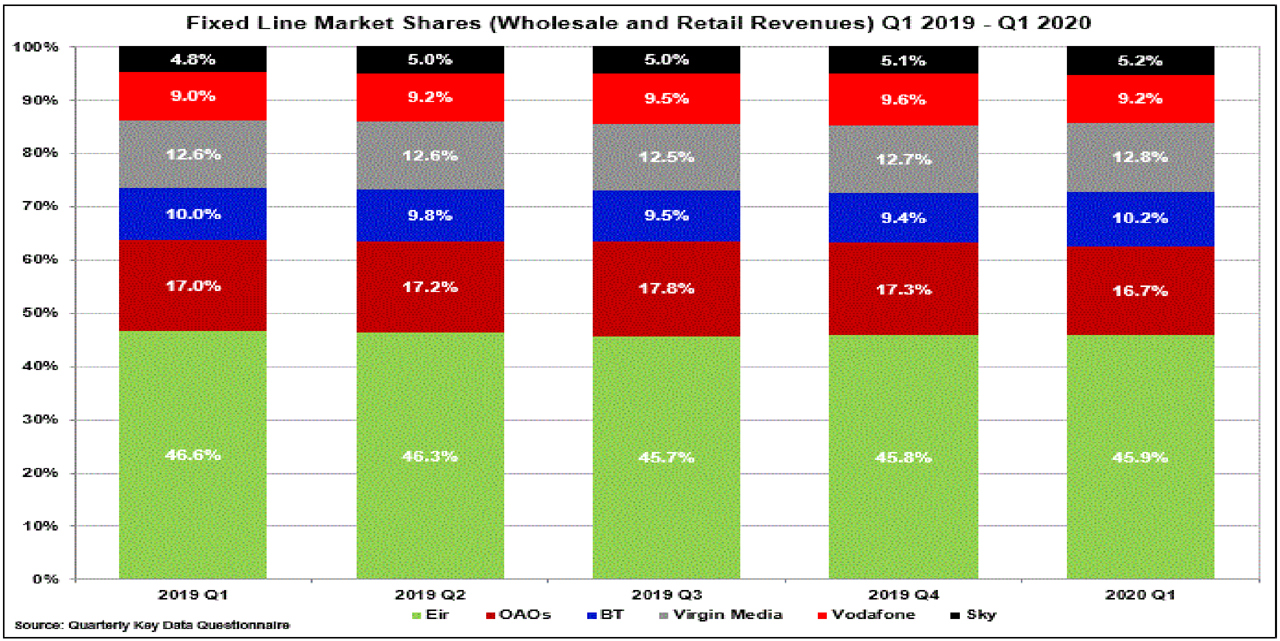
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q1 2020				
	Q1 2020	Q4 2019	Quarterly Change	Annual Change
Total Retail Market Revenues	€872,600,183	€906,744,628	-3.8%	+0.63%
Fixed Line Retail Revenues	€338,622,183	€345,475,139	-2.0%	+0.1%
Mobile Retail Revenues	€387,695,000	€409,922,997	-5.4%	0.5%
Broadcasting Retail Revenues	€146,283,000	€151,346,492	-3.3%	+5.2%
Fixed Line Wholesale Revenues	€132,743,462	€130,588,362	+1.7%	+1.7%
Mobile Wholesale Revenues	€40,923,000	€43,258,000	-5.4%	-2.9%
Total Voice Traffic (Minutes)	3,994,316,000	3,653,069,680	+9.3%	+6.1%
Fixed Voice Traffic (Minutes)	676,410,000	594,387,173	+13.8%	+1.1%
Mobile Voice Traffic (Minutes)	3,317,906,000	3,058,682,507	+8.5%	+7.2%
Fixed Broadband Subscriptions	1,476,709	1,462,549	+1.0%	+2.5%
Fixed Subscriptions	2,215,552	2,218,623	-0.1%	-1.0%
Fixed Voice Subscriptions	1,386,305	1,401,500	-1.1%	-4.2%
Total Mobile Subscriptions	6,737,414	6,669,317	+1.0%	+6.5%
Machine to Machine Subscriptions	1,295,598	1,206,513	+7.4%	+22.3%
Mobile Broadband Subscriptions	320,563	302,495	+6.0%	+6.0%
Mobile Voice Subscriptions	5,121,253	5,160,309	+0.8%	+3.1%
Total Mobile Data Volumes	176,970	150,390	+17.7%	+46.5%

Fixed Market

- In Q1 2020, Eir had the highest revenue share in the fixed market with a 45.9% market share.
- ComReg estimates that the next four largest operators (BT Ireland, Sky Ireland, Virgin Media Ireland and Vodafone (fixed only)) contribute a further 37.4% share of total (retail and wholesale) industry revenue, while Other Authorised Operators (OAOs) account for the remaining 16.7% share.

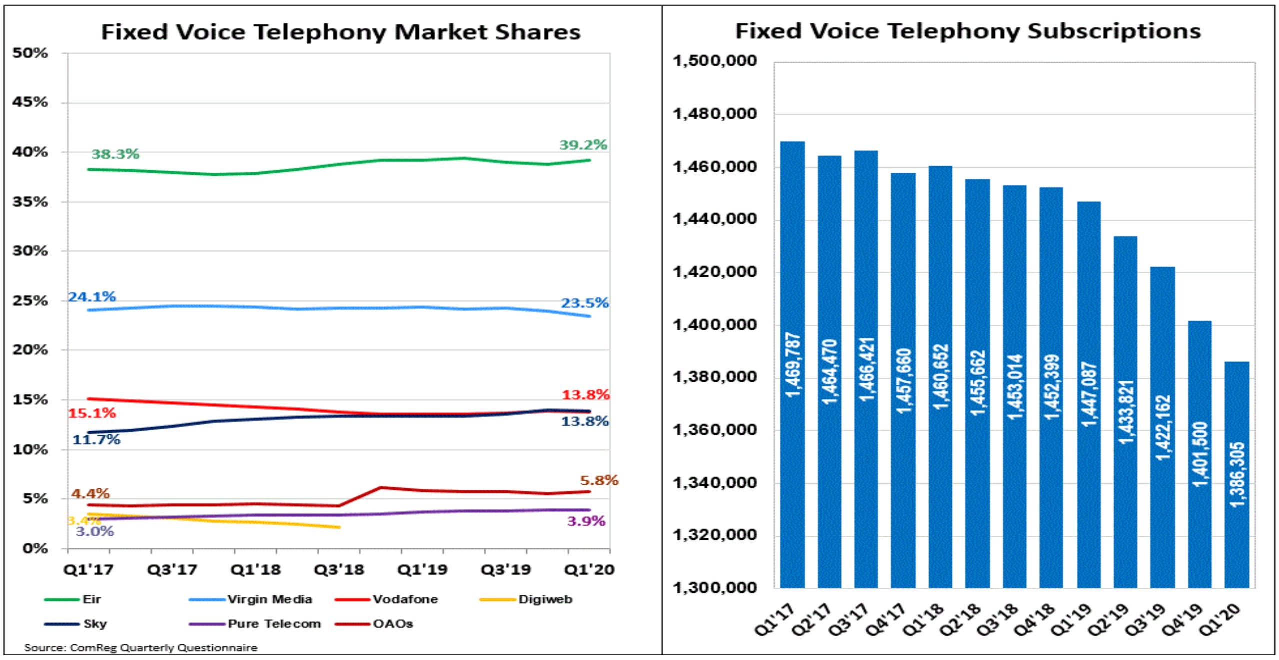
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Fixed Voice Market

Fixed voice traffic in Q1 2020 was over 676 million minutes, which was a 13.8% increase on Q4 2019 and an increase of 1.1% since Q1 2019. Managed voice over broadband (VoB) minutes account for approximately 20.5% of total fixed voice minutes, up slightly from 20.4% in Q1 2019.

Figure 2 - Fixed Voice Subscriptions



- At the end of Q1 2020 there were 1,386,305 fixed voice subscriptions (a decrease of 1.1% since Q4 2019 and a decrease of 4.2% on Q1 2019).
- As of Q1 2020 Eir had 39.2% of all fixed voice subscriptions followed by Virgin Media (23.5%), Vodafone (13.8%), Sky (13.8%) and Pure Telecom (3.9%). OAOs accounted for the remaining 5.8% of fixed voice subscriptions.

Broadband Market

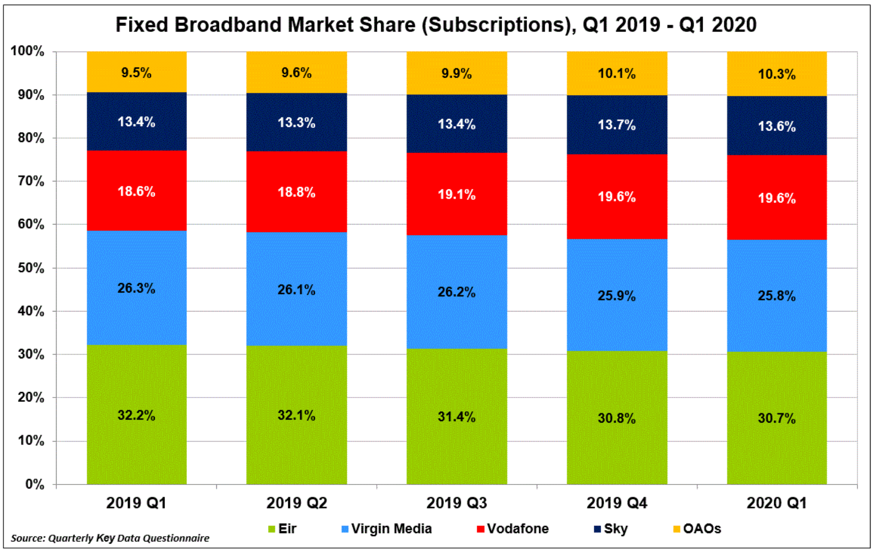
At the end of March 2020, there were 1.797 million active broadband subscriptions in Ireland. This was an increase of 1.9% on the previous quarter and a 3.1% increase on Q1 2019.

Table 2 - Total Number of Active Broadband Subscriptions

Subscription Type	Q1 2020	Quarterly Growth Q4'19 – Q1'20	Annual Growth Q1'19 – Q1'20
DSL Broadband	227,492	-5.3%	-19.1%
VDSL Broadband	639,153	+0.9%	+2.3%
Cable Broadband	372,999	+0.4%	-0.3%
FTTP Broadband	180,543	+11.2%	+64.2%
Satellite Broadband	3,266	-7.7%	-25.9%
FWA Broadband	53,256	+3.1%	+15.9%
Total Fixed Broadband	1,476,709	+1.0%	+2.5%
Mobile Broadband	320,563	+6.6%	+6.0%
Total Broadband	**1,797,272**	**+1.9%**	**+3.1%**

- Subscriptions for VDSL (+0.9%), FTTP (+11.2%), Cable (+0.4%), Mobile Broadband (+6.6%) and FWA (+3.1%) showed positive growth this quarter. DSL (-5.3%) and satellite (-7.7%) subscriptions both fell this quarter.

Figure 3 - Fixed Broadband Market Shares based on Subscriptions



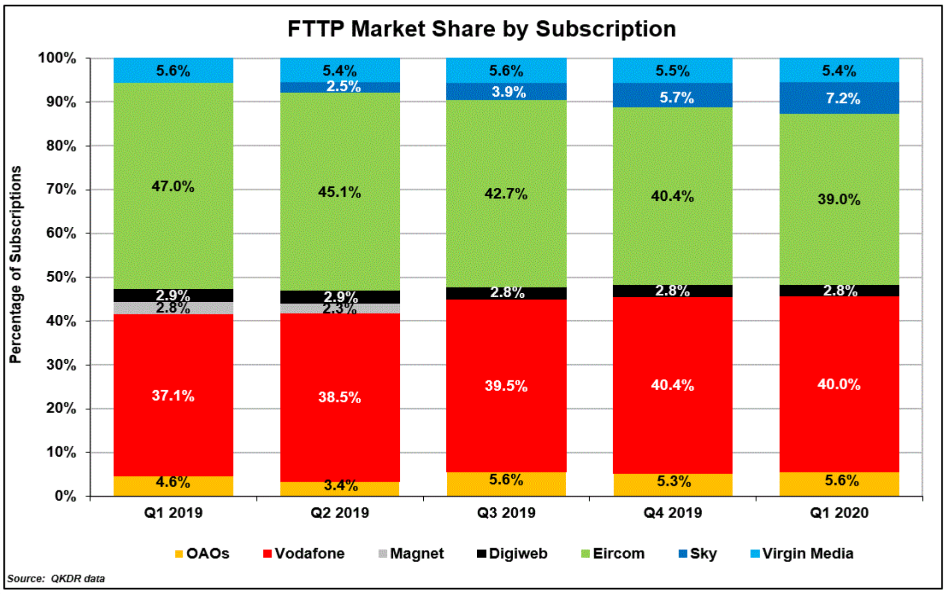
- In Q1 2020, Eir had 30.7% of total retail fixed broadband subscriptions, followed by Virgin Media who had 25.8% of subscriptions. Vodafone had 19.6% (excluding mobile broadband subscriptions) and Sky Ireland had a 13.6% market share.
- All other OAOs combined accounted for the remaining 10.3% share of retail fixed broadband subscriptions.

Table 3 - Fixed Broadband Subscriptions by Sold Speed

Fixed Broadband Subscriptions by Sold Speed	Q1 2020
<2Mbps	0.8%
2Mbps – 9.99Mbps	8.5%
=10Mbps – 29.99bps	11.1%
=30Mbps – 99.99Mbps	41.7%
>=100Mbps	37.9%

- 79.6% of all fixed broadband subscriptions were equal to or greater than 30Mbps in Q1 2020.

Figure 4 - FTTP Subscription Market Share

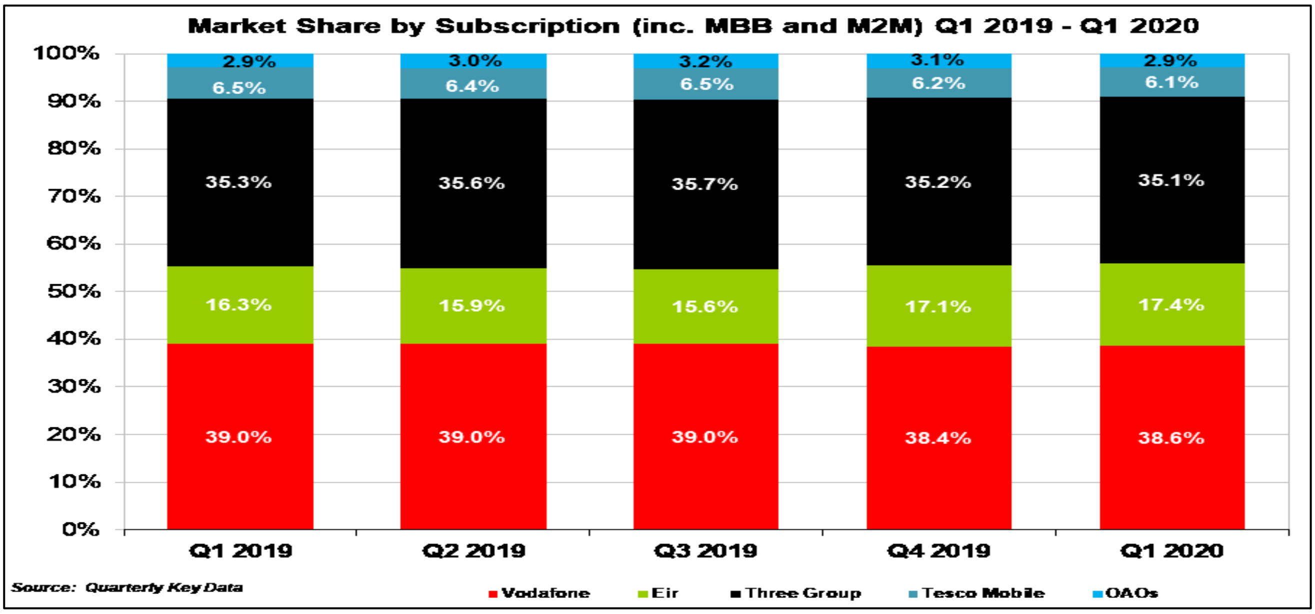


- In Q1 2020, Vodafone had 40.0% of retail FTTP subscriptions, followed by EIR at 39.0%, Virgin Media at 5.4%, Sky Ireland at 7.2% and Digiweb a 2.8% market share.
- OAOs combined accounted for the remaining 5.6% market share.

Mobile Market

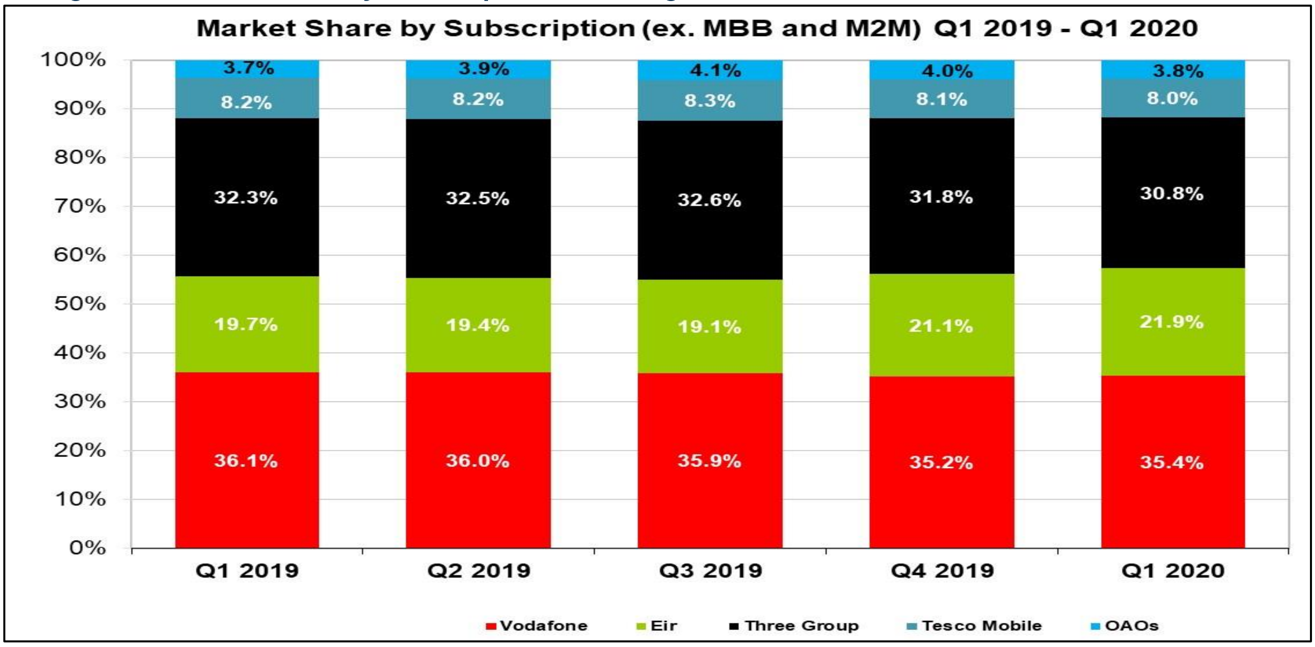
At the end of Q1 2020 there were 6,737,414 mobile subscriptions in Ireland, including mobile broadband and Machine to Machine ('M2M'). If mobile broadband subscriptions (320,563) and M2M subscriptions (1,295,598) are excluded, the total number of mobile subscriptions was 5,121,253.

Figure 5 - Market Share by Subscription including Mobile Broadband and Machine to Machine



- In Q1 2020 Vodafone had the largest share of mobile subscriptions including MBB and M2M at 38.6%, this was followed by Three with 35.1%, Eir with 17.4%, Tesco Mobile at 6.1% and OAOs at 2.9% of the market.

Figure 6 - Market Share by Subscription excluding Mobile Broadband and Machine to Machine



- In Q1 2020 Vodafone had the highest market share excluding mobile broadband and M2M (35.4%), followed by Three Group (30.8%), Eir (21.9%) and Tesco Mobile (8.0%).

Corrigendum to Q4 2019 QKDR – Q4 2016 QKDR

Three operators informed ComReg about incorrect historically provided information.

Note 1: Retail Revenue figures were revised from Q4 2016 to Q4 2019 following revisions from Vodafone Ireland Limited with these revisions ranging from -4.5 million to +0.1 million. Fixed Line Market Shares (by Retail Revenues), Fixed Line Market Shares (by Retail and Wholesale Revenues) and Total Fixed Revenues were impacted by these revisions.

Note 2: Mobile prepaid subscribers were revised from Q1 2019 to Q4 2019 for DSL and FTP were revised from Q4 2018 to Q3 2019 following revisions from Vodafone Ireland Limited with these revisions ranging from -4 subscriptions to +16,730 subscribers. Market Share by Subscription, pre/post subscription by operators, mobile subscriptions by pre-pay post-pay) were impacted by these revisions

Note 3: Mobile traffic figures were revised from Q1 2019 – Q4 2019 following revisions from Eir with these revisions ranging from 305,648 GB to 20,778,111 GB. Traffic in GB for standard mobile subscriptions (3G), Traffic in GB for standard mobile subscriptions (4G), Traffic in GB for dedicated mobile broadband subscriptions (3G), Traffic in GB for dedicated mobile broadband subscriptions (4G), Total traffic (Mobile) were impacted by these revisions.

Note 4: Subscribers by technology (2G,3G,4G) were revised from Q3 2017 – Q4 2019 from Three Ireland Limited with these revisions ranging from +101,583 to +1,368,808. Mobile Subscriptions by Technology Used were impacted by these revisions.

Note 5: Mobile Broadband Subscriptions were revised for Q4 2019 from Three Ireland Limited with these revisions ranging from +1,709 to +66,141. Market Shares by Subscription (inc. MBB and M2M) and Mobile Subscriptions (inc. MBB & M2M) were impacted by these revisions.

Memorandum

Chart	Indicator	Definition
Table 1	Communications Summary	Tablular summary of the key quarterly data.
Figure 1	Fixed Line Market Shares based on Wholesale and Retail Revenue	This chart shows the fixed line retail and wholesale revenue market share for operators who have 2.0% or more revenues market share. Includes revenues from the provision of interconnection, wholesale fixed narrowband access, wholesale broadband access, wholesale leased lines and managed data services (including revenues from Partial Private Circuits), retail fixed voice services, retail broadband services and retail leased line, managed data, and other ancillary services including web-hosting, directory publication and other services.
Figure 2	Fixed Voice Subscriptions	This chart shows the total number of fixed voice subscriptions (either standalone or part of a bundle) and the fixed voice subscriptions market share for operators who have 2.0% or more subscriptions market share.
Table 2	Total Number of Active Broadband Subscriptions	This table quantifies the number of subscriptions (both residential and business) with broadband Internet access. The growth rates are for quarterly and year-on-year growth in subscription numbers across each form of internet access. One subscriber may have more than one internet subscription.
Figure 3	Fixed Broadband Market Shares based on Subscriptions	This chart shows the percentage market share of the fixed broadband market by operator with at least 2.0% market share. Note: Based on operator share of the number of retail lines for DSL, VDSL, FTTP and cable plus subscriptions for satellite and FWA.
Table 3	Total Broadband Subscriptions % by Sold Speed	This chart provides an indication of the percentage of total retail business fixed broadband subscriptions split by categories of actual sold download speeds.
Figure 4	FTTP Subscription Market Share	This chart shows the percentage market share of the fixed broadband market by operator with at least 2.0% market share.

		Note: Based on operator share of the number of retail lines for FTTP subscriptions.
Figure 5	**Market Share by Subscription including Mobile Broadband (MBB) and Machine to Machine (M2M)**	Each mobile operator's share of the total number of mobile subscriptions (GSM/2G Sims, 3G/HSDPA Sims and 4G/LTE data cards and modems), expressed as a percentage.
Figure 6	**Market Share by Subscription excluding Mobile Broadband (MBB) and Machine to Machine (M2M)**	This chart shows the percentage market share of Business subscriptions in Ireland (excluding mobile broadband and M2M subscriptions) .