An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Date: 09/06/2022

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q1 2022

QKDR DATA PORTAL

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Reference: **ComReg 22/45**

An Coimisiún um Rialáil Cumarsáide
Commission for Communications Regulation
1 Dockland Central, Guild Street, Dublin 1, D01 E4X0, Ireland.
Telephone +353 1 804 9600. Fax +353 1 804 9680. Email info@comreg.ie |
Web www.comreg.ie

Q1 2022 Key Quarterly Trends

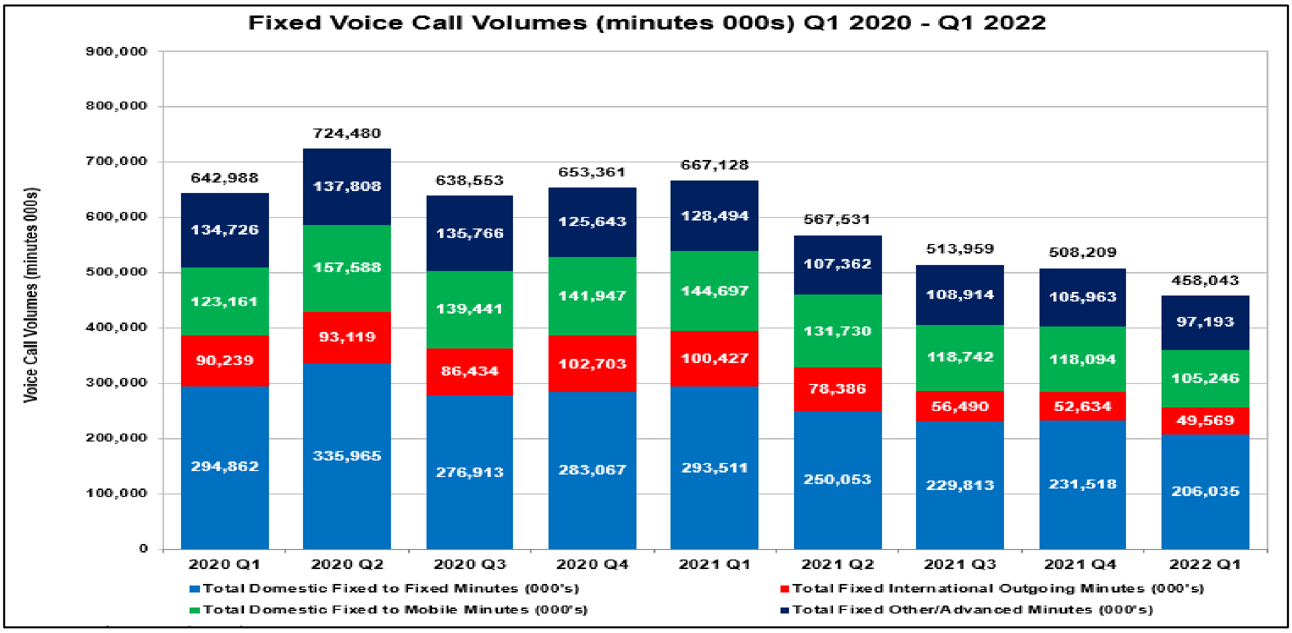
402k (+8%) Total FTTP broadband subscriber lines

83k (+4%) Total FWA broadband subscriber lines

8.1m Mobile subscriptions (Incl. MBB & M2M)

539k 5G mobile subscriptions (Voice & MBB)

10% Decrease in total fixed voice minutes



DSL broadband subscriber lines decreased 21% YoY
&
DSL broadband subscriber line traffic decreased 45% YoY

5G mobile subscriptions increased 38% QoQ
&
5G mobile traffic increased 50% QoQ

22% of broadband subscriber lines have a speed of >=500Mbps In Q1 2022

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. Please note Broadband Subscriptions were renamed to Subscriber Lines in Q1 2022 to accurately reflect the definition of the data provided.

Please note that from Q2 2020 the design of the Quarterly Key Data Report has been updated. The data that has been removed from this report, along with the detailed presentation of data in the report itself are all 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 January 2022 to 31st March 2022. The report is based on submissions from 46 active operators.

The report contains the following key charts/data

- Overview of Markets
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- Mobile Market
    - Figure 5 – Retail Market Shares by Subscription including Mobile Broadband (MBB) and Machine to Machine (M2M)
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Overview of Irish Communications Market Q1 2022

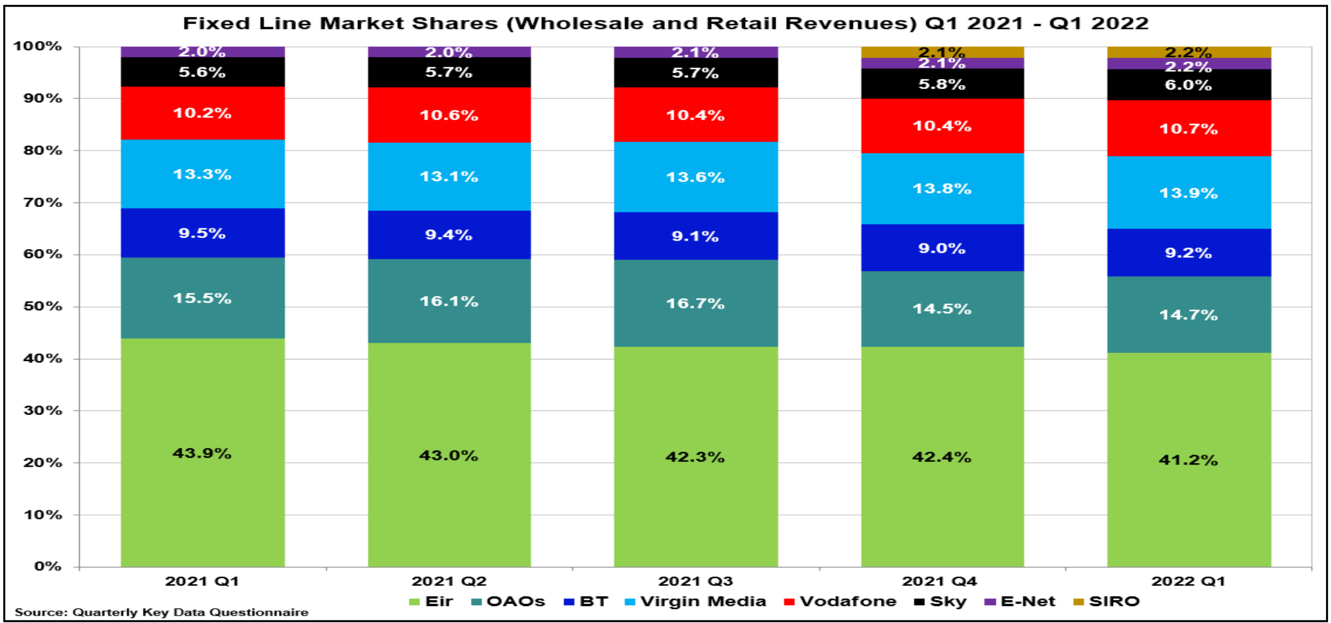
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q1 2022				
	Q4 2021	Q1 2022	Quarterly Change	Annual Change
Total Retail Market Revenues	€891,682,892	€865,394,345	-2.9%	-1.7%
Fixed Line Retail Revenues	€327,535,478	€323,934,681	-1.1%	-2.8%
Mobile Retail Revenues	€414,173,414	€390,913,474	-5.6%	-3.2%
Broadcasting Retail Revenues	€149,974,000	€150,546,191	0.4%	5.1%
Fixed Line Wholesale Revenues	€141,234,478	€138,871,739	-1.7%	3.7%
Mobile Wholesale Revenues	€37,470,000	€33,614,000	-10.3%	-0.1%
Total Voice Traffic (Minutes)	3,938,899,119	3,775,603,673	-4.1%	-5.8 %
Fixed Voice Traffic (Minutes)	508,209,225	458,043,287	-9.9%	-31.3%
Mobile Voice Traffic (Minutes)	3,430,689,894	3,317,560,386	-3.3%	-0.7%
Fixed Broadband Subscriber Lines	1,576,973	1,588,643	0.7%	3.0%
Total Fixed Subscriptions	2,190,028	2,173,113	-0.8%	-1.7%
Fixed Voice Subscriptions	1,293,971	1,272,320	-1.7%	-5.6%
Total Mobile Subscriptions	7,899,776	8,117,950	2.8%	13.1%
Machine to Machine Subscriptions	2,176,011	2,350,336	8.0%	44.1%
Mobile Broadband Subscriptions	349,900	353,523	1.0%	6.1%
Mobile Voice Subscriptions	5,373,865	5,414,091	0.8%	3.8%
Total Fixed Broadband Data Traffic (GB)	1,637,484,993	1,656,616,705	1.2%	-4.5%
Mobile Broadband (Dongles) Data Traffic (GB)	87,883,789	93,006,765	5.8%	28.6%
Standard Mobile Subscriptions Data Traffic (GB)	194,181,534	203,724,583	4.9%	26.1%
Total Mobile Data Volumes (GB)	285,040,911	296,972,943	4.2%	25.6%

Fixed Market

- In Q1 2022, Eir had the highest revenue share in the fixed market with a 41.2% market share. ComReg estimates that the next six largest operators (BT Ireland, Sky Ireland, Virgin Media Ireland, Vodafone (fixed only), E-Net & SIRO) contribute a further 44.1% share of total (retail and wholesale) industry revenue, while Other Authorised Operators (OAOs) account for the remaining 14.7% share.

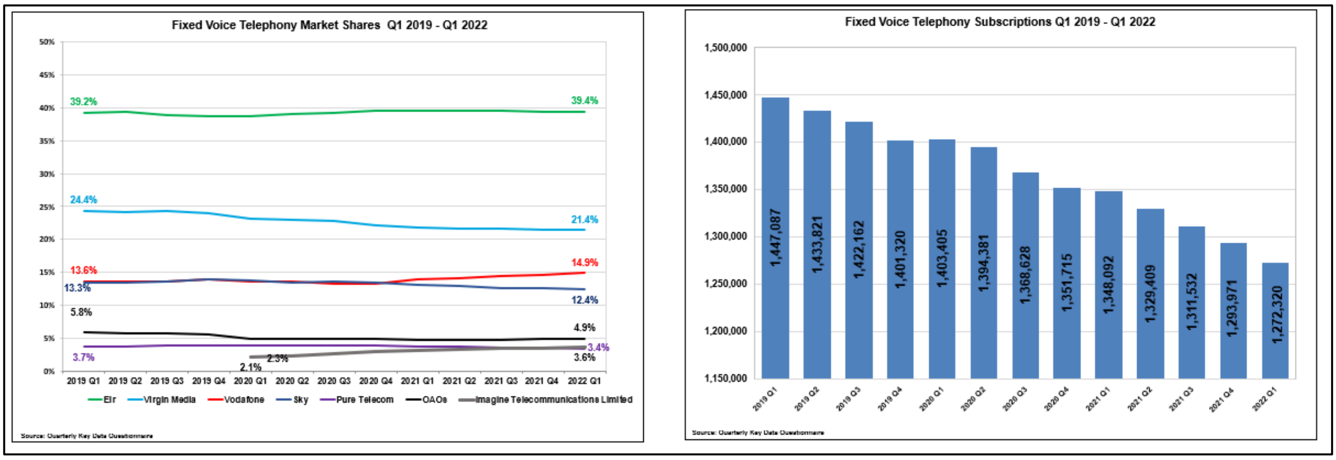
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Fixed voice traffic in Q1 2022 was over 458 million minutes, which was a 9.9% decrease on Q4 2021 and a decrease of 31.3% since Q1 2021. Managed voice over broadband (VoB) minutes account for approximately 26.4% of total fixed voice minutes, up from 23.4% in Q1 2021.

Figure 2 – Retail Fixed Voice Subscriptions



- At the end of Q1 2022 there were 1,272,320 fixed voice subscriptions (a decrease of 1.67% since Q4 2021 and a decrease of 5.62% on Q1 2021).
- As of Q1 2022 Eir had 39.4% of all fixed voice subscriptions followed by Virgin Media (21.4%), Vodafone (14.9%), Sky (12.4%), Imagine Telecommunications Limited (3.6%) &Pure Telecom (3.4%). OAOs accounted for the remaining 4.9% of fixed voice subscriptions.

Retail Broadband Market

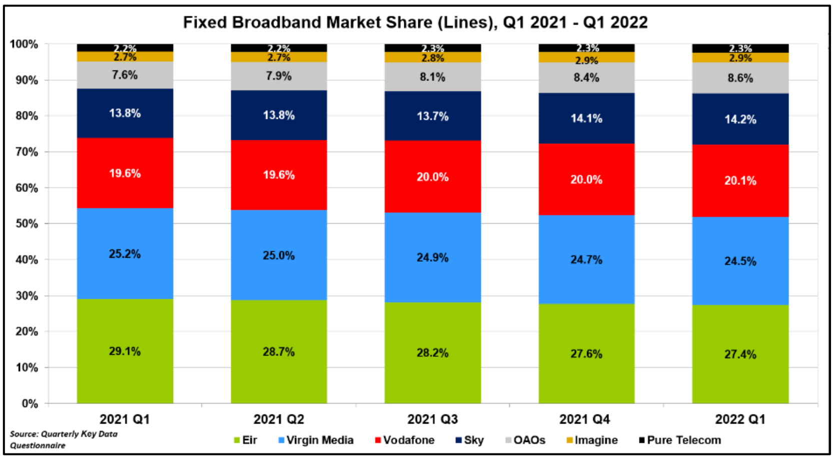
At the end of March 2022, there were 1.94 million active broadband subscriber lines in Ireland. This was an increase of 0.8% on the previous quarter and a 3.6% increase on Q1 2021.

Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q1 2022	Quarterly Growth Q4'21 – Q1'22	Annual Growth Q1'21 – Q1'22
Cable Broadband	376,238	-0.19%	-0.35%
DSL Broadband	139,568	-5.92%	-20.52%
VDSL Broadband	586,173	-1.97%	-7.64%
FTTP Broadband	401,868	8.05%	42.49%
Satellite Broadband	1,665	-6.09%	-27.29%
FWA Broadband	83,131	3.84%	19.17%
Total Fixed Broadband	1,588,643	0.74%	3.03%
Mobile Broadband	353,523	1.04%	6.14%
Total Broadband	1,942,166	0.79%	3.58%

- Lines for FTTP (+8.05%), FWA (+3.84%) & Mobile Broadband (+1.04%) showed positive growth this quarter. VDSL (-1.97%), DSL (-5.92%), Cable (-0.19%) and Satellite (-6.09%) subscriber lines all fell this quarter.

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



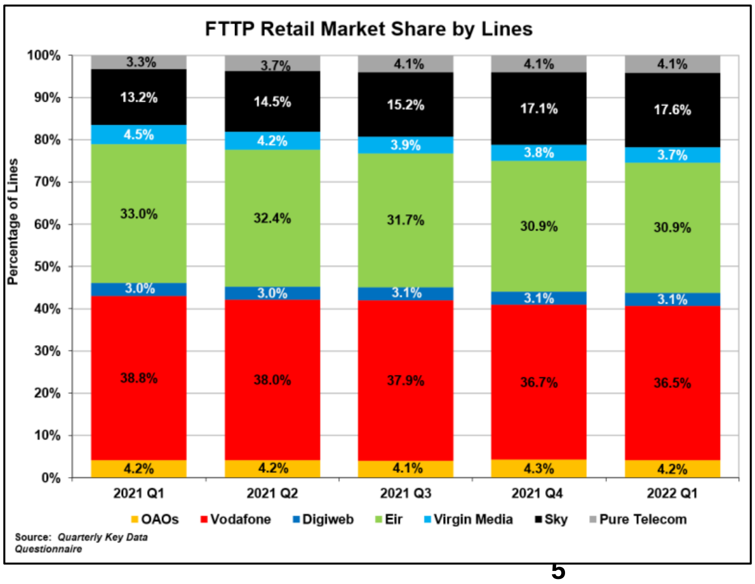
- In Q1 2022, Eir had 27.4% of total retail fixed broadband subscriber lines, followed by Virgin Media who had 24.5% of lines. Vodafone had 20.1% (excluding mobile broadband), Sky Ireland 14.2% and Imagine and Pure Telecom had 2.9% and 2.3% market share respectively.
- All other OAOs combined accounted for the remaining 8.6% 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 2022	Q4 2021	Quarterly Change
<2Mbps - 9.99Mbps	5.3%	5.7%	-0.4%
=10Mbps - 29.99Mbps	7.3%	7.5%	-0.2%
=30Mbps - 99.99Mbps	35.8%	36.7%	-0.9%
=100Mbps - 499.99Mbps	29.4%	30.2%	-0.8%
=500Mbps - 999.99Mbps	14.8%	12.9%	+1.9%
>=1GB	7.4%	7.1%	+0.3%

- 87.4% of all fixed broadband subscriber lines had sold speeds which were equal to or greater than 30Mbps in Q1 2022.

Figure 4 - FTTP Subscriber Line Market Share

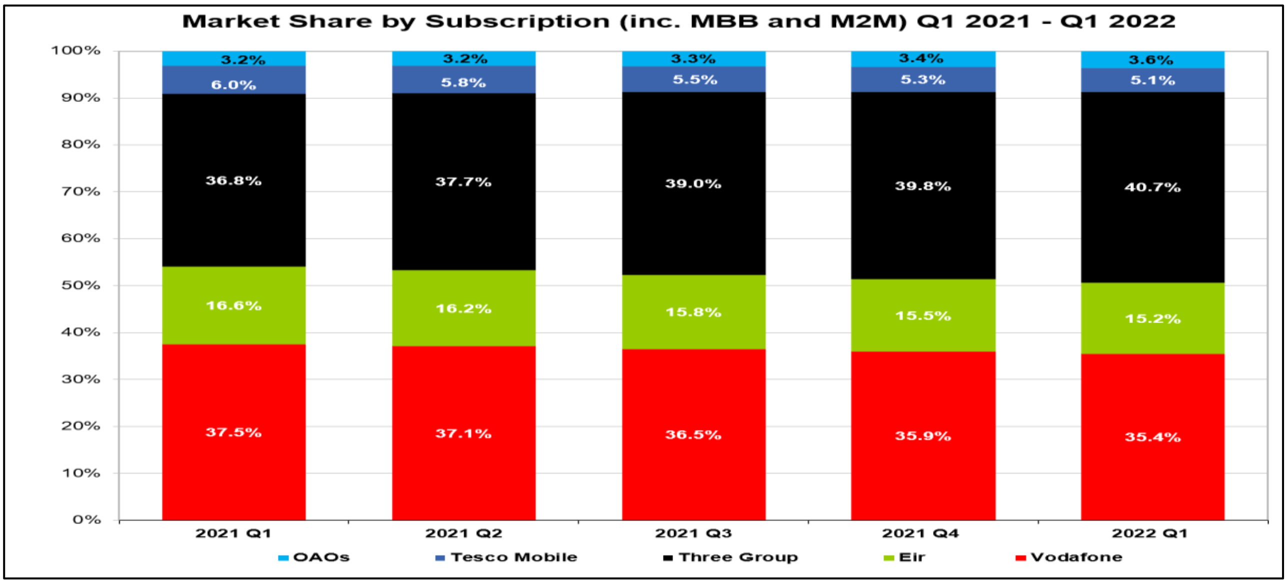


- In Q1 2022, Vodafone had 36.5% of retail FTTP subscriber lines, followed by Eir at 30.9%, Sky Ireland at 17.6%, Pure Telecom at 4.1%, Virgin Media at 3.7%, and Digiweb at 3.1% market share.
- OAOs combined accounted for the remaining 4.2% market share.

Mobile Market

At the end of Q1 2022 there were 8,117,950 mobile subscriptions in Ireland, including mobile broadband ('MBB') and Machine to Machine ('M2M'). If mobile broadband subscriptions (353,523) and M2M subscriptions (2,350,336) are excluded, the total number of mobile subscriptions was 5,414,091.

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

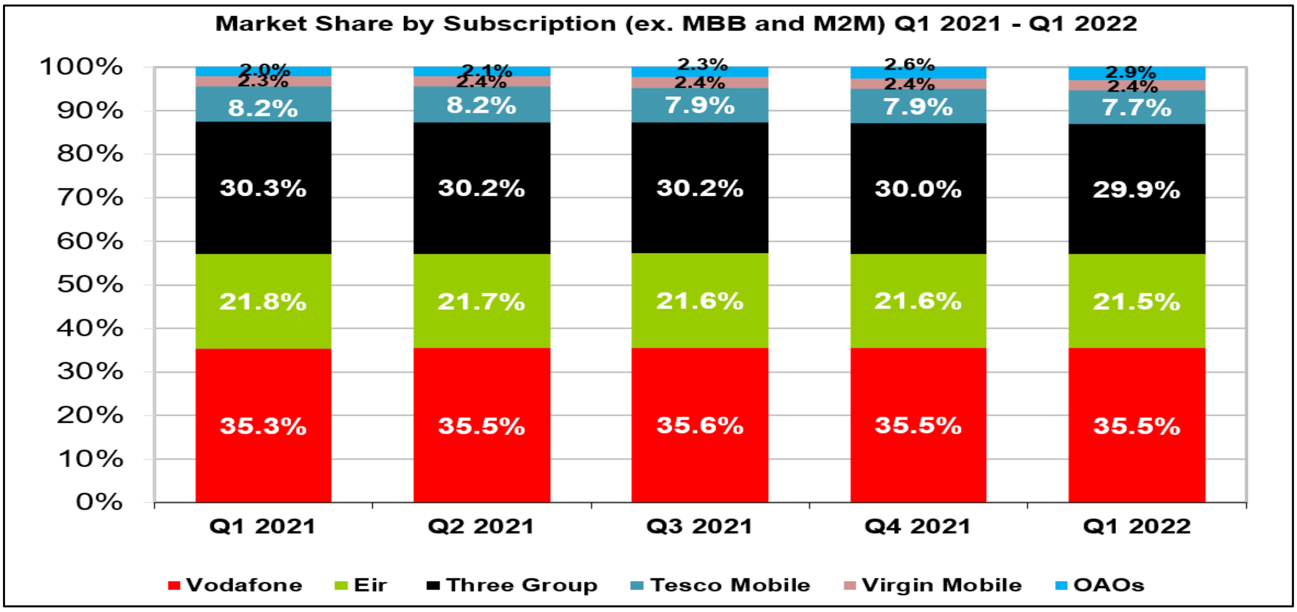


- In Q1 2022 Three had the largest share of mobile subscriptions including MBB and M2M at (40.7%). This was followed by Vodafone with (35.4%), Eir with (15.2%), Tesco Mobile at (5.1%) and OAOs at (3.6%).

- In Q1 2022 Vodafone had the highest market share excluding mobile broadband and M2M (35.5%), followed by Three (29.9%), Eir (21.5%), Tesco Mobile (7.7%), Virgin Mobile (2.4%) and OAOs (2.9%).

- In Q1 2022 there were 1,234,671 **2G**, 1,390,379 **3G**, 4,953,872 **4G** and 539,028 **5G** mobile voice & MBB subscriptions.

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



Corrigendum to Q1 2021 – Q4 2021 QKDR

Note 1: Mobile to Fixed minutes and Mobile Advanced minutes were revised for Q1 2021 – Q4 2021 following revisions from Vodafone Mobile.

Note 2: The breakout of Fixed Line Wholesale Revenues was revised for Q4 2021 following revisions from Eircom.

Note 3: WLR ISDN Access Lines, VOB and SIP Trunking, no. of Voip channels and subscriptions (equivalent to ISDN PRA and FRA) were revised for Q4 2021 following revisions from Magnet.

Note 4: Fixed telephony subscriptions including fixed residential, single, double and triple play subscriptions were revised for Q2 2021 following revisions from Eir. Impacted fixed market shares are now updated.

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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 market shares by revenue. This 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 Subscriber Lines**	This table quantifies the number of subscriber lines (both residential and business) with broadband Internet access. The growth rates are for quarterly and year-on-year growth in subscriber line numbers across each form of internet access.
Figure 3	**Fixed Broadband Market Shares based on Subscriber Lines**	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 subscriber lines for DSL, VDSL, FTTP and cable plus subscriber lines for satellite and FWA.
Table 3	**Total Broadband Subscriber Lines % by Sold Speed**	This chart provides an indication of the percentage of total retail business fixed broadband subscriber lines split by categories of sold download speeds.
Figure 4	**FTTP Subscriber Lines 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 Subscriber lines for FTTP Subscriber Lines.
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 & 5G) 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) .