Date: 08/09/2022

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q2 2022

QKDR DATA PORTAL

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Reference: **ComReg 22/76**

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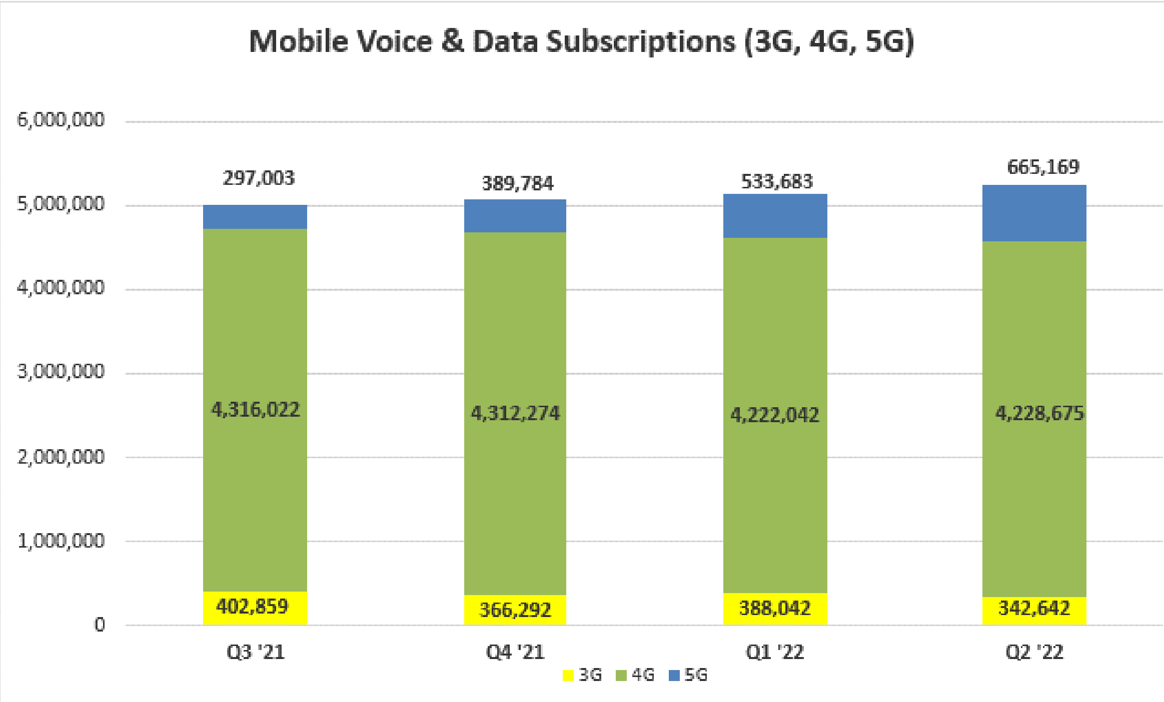
Q2 2022 Key Quarterly Trends

431k (+7.7%) Total FTTP broadband subscriber lines

8.3m (+3%) Mobile subscriptions (Incl. MBB & M2M)

664k 5G mobile subscriptions (Voice & MBB)



DSL broadband subscriber lines decreased 20% YoY
&
VDSL broadband subscriber lines decreased 8.7% YoY

5G mobile subscriptions increased 23% QoQ
&
5G mobile traffic increased 30% QoQ

24% of broadband subscriber lines have a speed of >=500Mbps In Q2 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 April 2022 to 30th June 2022. The report is based on submissions from 47 active operators.

The report contains the following key charts/data

- Overview of Markets
    - Table 1 – Communications Summary
- Fixed Markets
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    - Figure 2 – Retail Fixed Voice Subscriptions
  - Broadband Market
    - Table 2 – Total Number of Active Subscriber Broadband Lines
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    - Table 3 – Retail Fixed Broadband Subscriber Lines by Sold Download Speed
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- Mobile Market
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Overview of Irish Communications Market Q2 2022

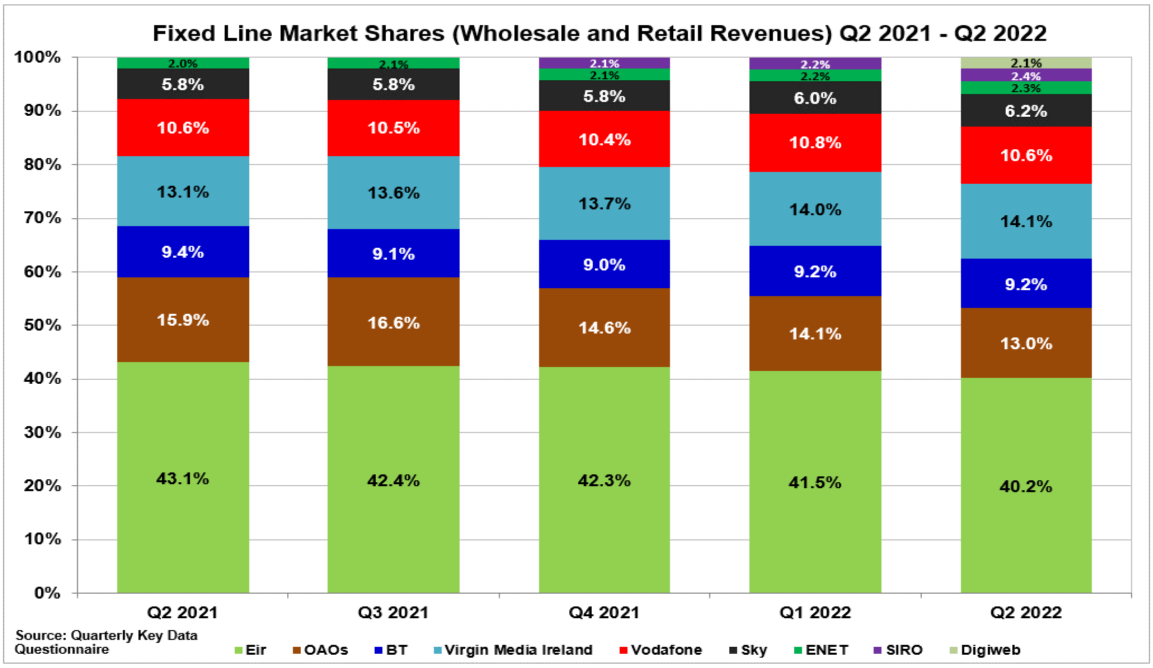
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q2 2022				
	Q1 2022	Q2 2022	Quarterly Change	Annual Change
Total Retail Market Revenues	€862,033,871	€864,232,122	0.3%	1.6%
Fixed Line Retail Revenues	€320,573,681	€317,466.602	-1.0%	-3.1%
Mobile Retail Revenues	€390,913,474	€397,757.446	1.8%	4.8%
Broadcasting Retail Revenues	€150,546,191	€149,008.074	-1.0%	4.1%
Fixed Line Wholesale Revenues	€139,046,738	€132,489.917	-4.7%	-4.0%
Mobile Wholesale Revenues	€33,614,000	€34,853.000	3.7%	-2.0%
Total Voice Traffic (Minutes)	3,776,511,010	3,686,536,431	-2.4%	-11.1%
Fixed Voice Traffic (Minutes)	458,043,287	431,394.230	-6.0%	-24.0%
Mobile Voice Traffic (Minutes)	3,317,560,386	3,255,142.202	-1.9%	-9.0%
Fixed Broadband Subscriber Lines	1,587,169	1,595,096	0.5%	2.6%
Total Fixed Subscriptions	2,172,732	2,164,275	-0.4%	-1.8%
Fixed Voice Subscriptions	1,271,890	1,257,278	-1.1%	-5.4%
Total Mobile Subscriptions	8,117,950	8,357,695	3.0%	13.5%
Machine to Machine Subscriptions	2,350,336	2,492,123	6.0%	39.0%
Mobile Broadband Subscriptions	353,523	357,746	1.2%	4.9%
Mobile Voice Subscriptions	5,414,091	5,507,826	1.7%	5.3%
Total Fixed Broadband Data Traffic (GB)	1,656,616,705	1,568,793,113	-5.3%	3.8%
Mobile Broadband (Dongles) Data Traffic (GB)	93,006,765	91,988,338	-2.3%	34.3%
Standard Mobile Subscriptions Data Traffic (GB)	204,881,312	215,610,156	3.6%	34.9%
Total Mobile Data Volumes (GB)	303,580,598	317,073,272	4.4%	36.8%

Fixed Market

- In Q2 2022, Eir had the highest revenue share (retail and wholesale) in the fixed market at 40.2%.
- ComReg estimates that the next six largest operators (BT Ireland, Sky Ireland, Virgin Media Ireland, Vodafone (fixed only), E-Net, SIRO & Digiweb) contribute a further 46.8% share of total industry revenue.
- Other Authorised Operators (OAOs) account for the remaining 13% share.

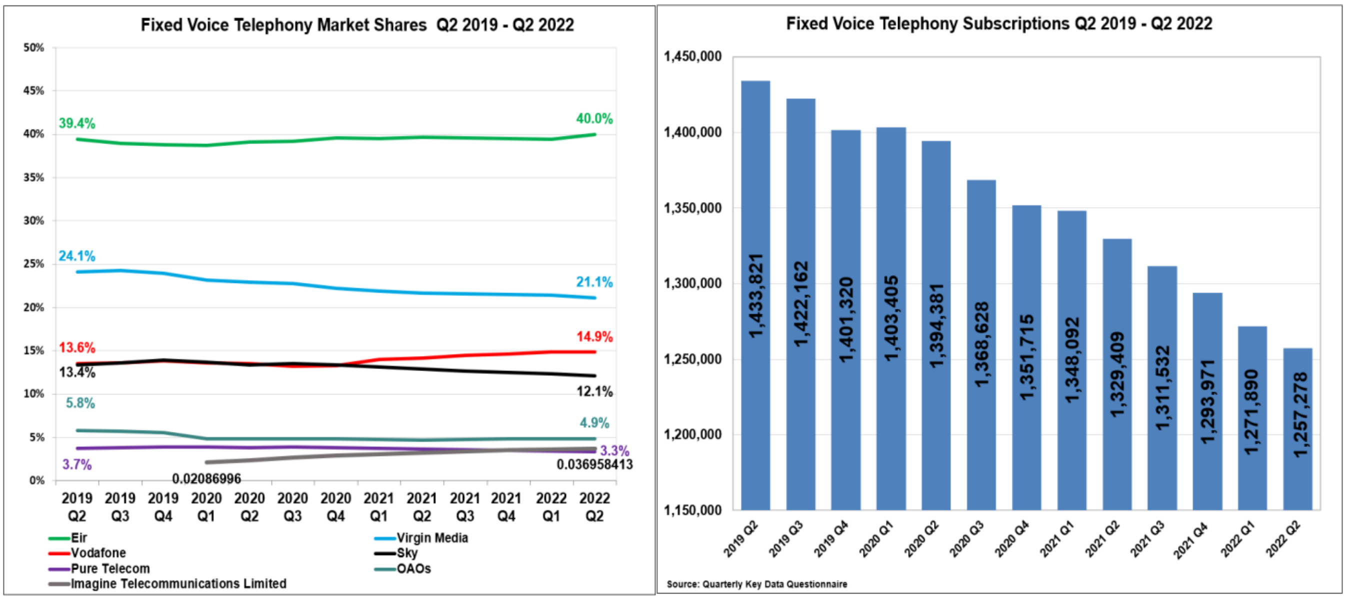
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Fixed voice traffic in Q2 2022 was over 431 million minutes, which was a 6.0% decrease on Q1 2022 and a decrease of 24.0% since Q1 2022. Managed voice over broadband (VoB) minutes account for approximately 26.2% of total fixed voice minutes, with Q2 2021 remaining the same at 26.2%.

Figure 2 – Retail Fixed Voice Subscriptions



- At the end of Q2 2022 there were 1,257,278 fixed voice subscriptions (a decrease of 1.1% since Q1 2022 and a decrease of 5.4% on Q2 2021).
- As of Q2 2022 Eir had 40.0% of all fixed voice subscriptions followed by Virgin Media (21.1%), Vodafone (14.9%), Sky (12.1%), Imagine Telecommunications Limited (3.7%) & Pure Telecom (3.3%). OAOs accounted for the remaining 4.9% of fixed voice subscriptions.

Retail Broadband Market

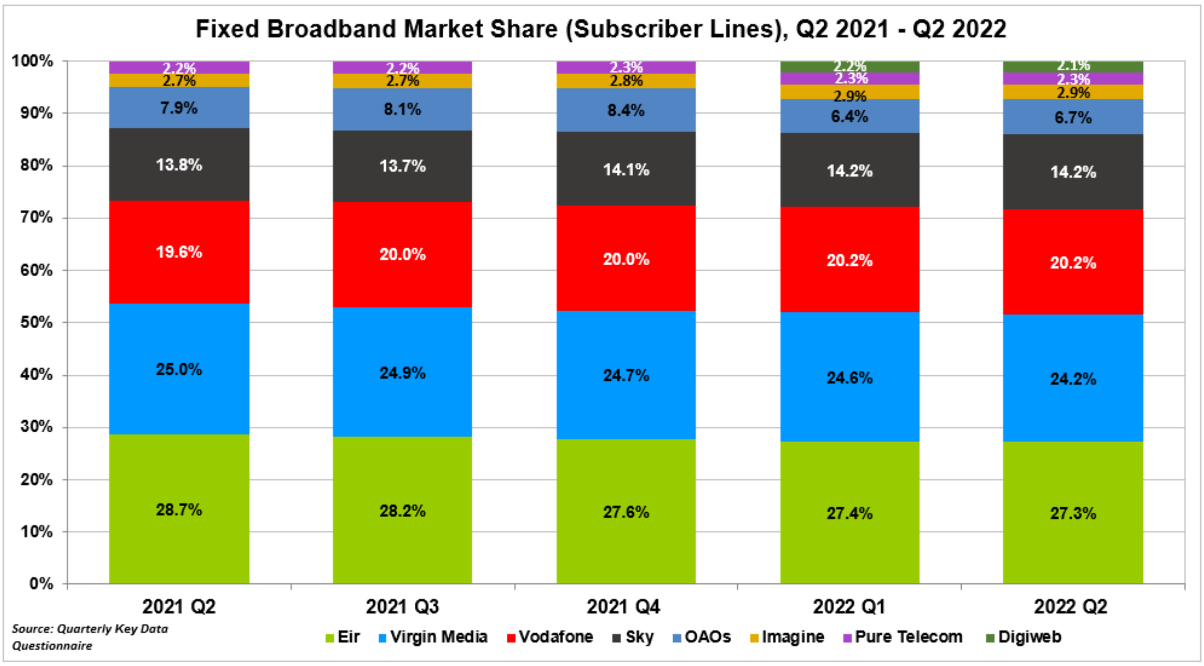
At the end of June 2022, there were 1.95 million active broadband subscriber lines in Ireland. This was an increase of 0.5% on the previous quarter and a 2.6% increase on Q2 2021.

Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q2 2022	Quarterly Growth Q1’22 – Q2’22	Annual Growth Q2’21 – Q2’22
Cable Broadband	372,423	-1.0%	-1.2%
DSL Broadband	132,496	-5.1%	-20.0%
VDSL Broadband	571,166	-2.6%	-8.7%
FTTP Broadband	431,388	7.7%	39.5%
Satellite Broadband	3,296	98%	58.5%
FWA Broadband	84,327	1.4%	11.6%
Total Fixed Broadband	1,595,096	0.5%	2.6%
Mobile Broadband	357,746	1.2%	5.0%
Total Broadband	**1,952,842**	**0.6%**	**3.0%**

- Lines for FTTP (+7.7%), FWA (+1.4%), Satellite (98%) & Mobile Broadband (+12%) showed positive growth this quarter. VDSL (-2.6%), DSL (-5.1%) and Cable (-1.0%) subscriber lines all fell this quarter.

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



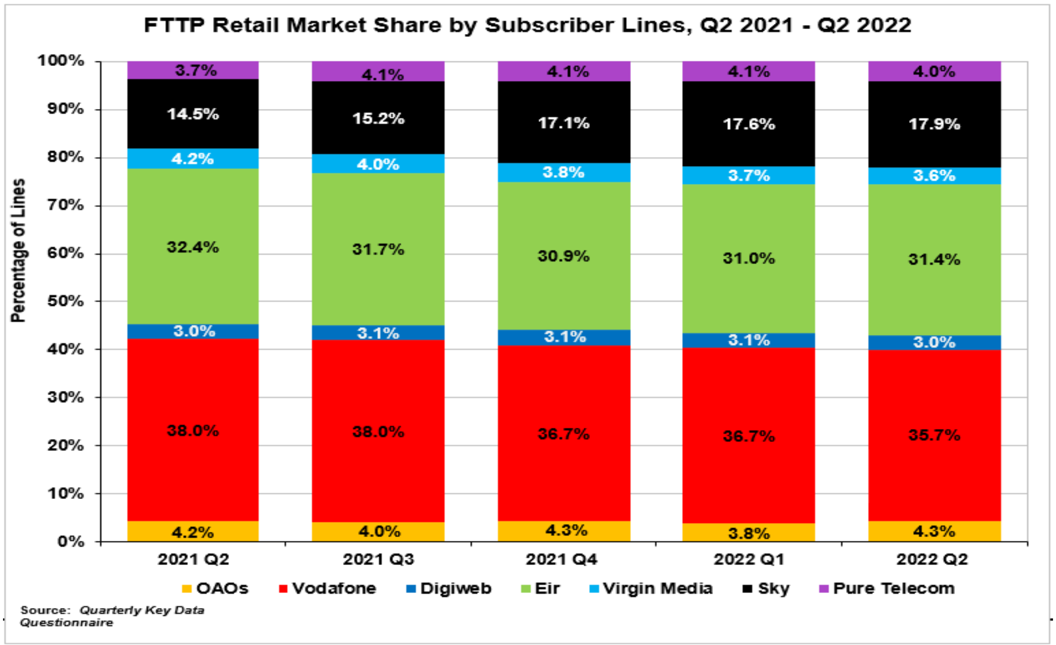
- In Q2 2022, Eir had 27.3% of total retail fixed broadband subscriber lines, followed by Virgin Media who had 24.2% of lines. Vodafone had 20.2% (excluding mobile broadband), Sky Ireland 14.2%, Imagine 2.9%, Pure Telecom 2.3% and Digiweb 2.1% market share.
- All other OAOs combined accounted for the remaining 6.7% 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 2022	Q1 2022	Quarterly Change
<2Mbps - 9.99Mbps	5.0%	5.3%	-0.3%
=10Mbps - 29.99Mbps	6.9%	7.3%	-0.4%
=30Mbps - 99.99Mbps	34.7%	35.8%	-1.1%
=100Mbps - 499.99Mbps	28.6%	29.4%	-0.8%
=500Mbps - 999.99Mbps	17.0%	14.8%	+2.2%
>=1GB	7.7%	7.4%	+0.3%

- 88.1% of all fixed broadband subscriber lines had sold speeds which were equal to or greater than 30Mbps in Q2 2022.

Figure 4 - FTTP Subscriber Line Market Share

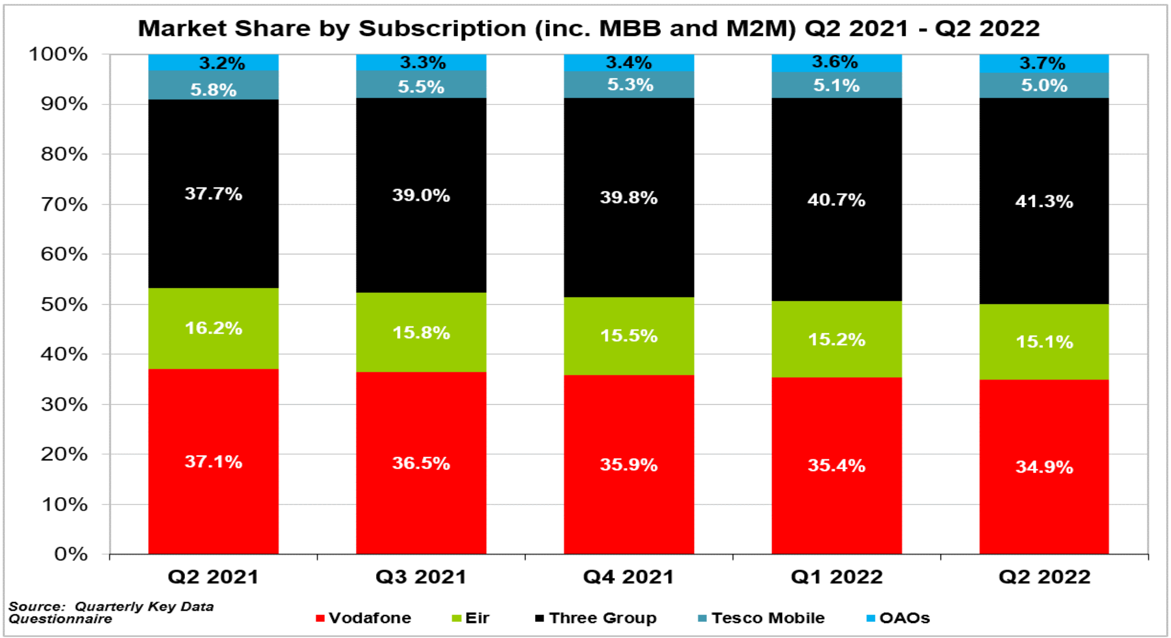


- In Q2 2022, Vodafone had 35.7% of retail FTTP subscriber lines, followed by Eir at 31.4%, Sky Ireland at 17.9%, Pure Telecom at 4.3%, Virgin Media at 3.6%, and Digiweb at 3.0% market share. OAOs accounted for the remaining 4.3%

Mobile Market

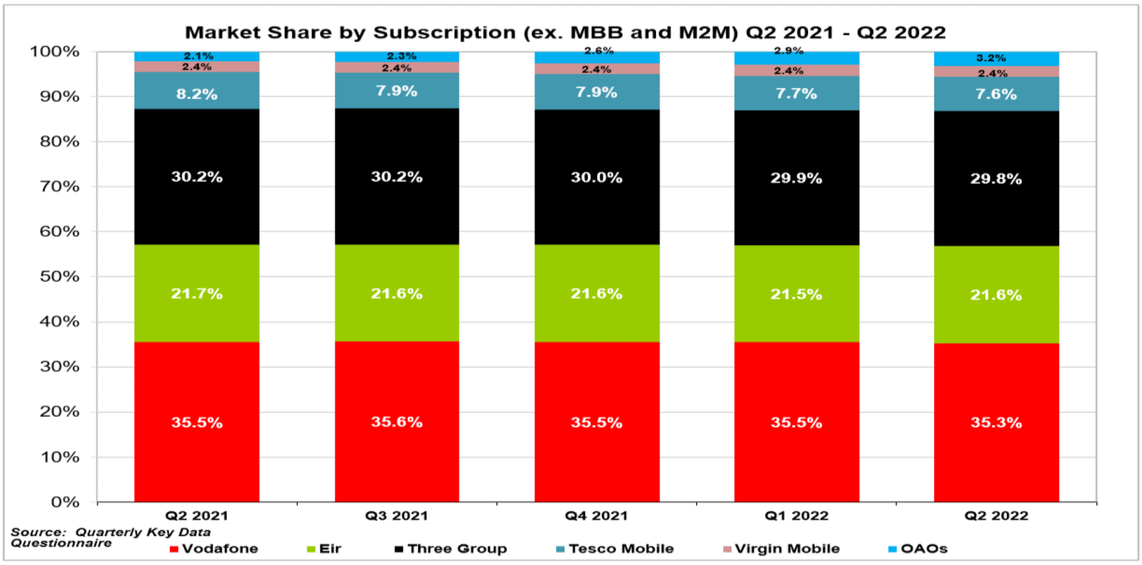
At the end of Q2 2022 there were 8,357,695 mobile subscriptions in Ireland, including mobile broadband ('MBB') and Machine to Machine ('M2M'). If mobile broadband subscriptions (357,746) and M2M subscriptions (2,492,123) are excluded, the total number of mobile subscriptions was 5,507,826.

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



- In Q2 2022 Three had the largest share of mobile subscriptions including MBB and M2M at 41.3%. This was followed by Vodafone with 34.9%, Eir with 15.1%, Tesco Mobile at 5.0% and OAOs at 3.7%.
- In Q2 2022 Vodafone had the highest market share excluding mobile broadband and M2M (35.3%), followed by Three (29.8%), Eir (21.6%), Tesco Mobile (7.6%), Virgin Mobile (2.4%) and OAOs (3.2%).
- There were 1,339,356 **2G**, 1,383,385 **3G**, 4,970,552 **4G** and 664,402 **5G** mobile subscriptions in Q2.

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



Corrigendum to Q1 2021 – Q1 2022 QKDR

Note 1: M2M traffic was revised for Q1 2022 following revisions received from Three.

Note 2: DSL, FTTP & VDSL lines were revised for Q1 2022 following revisions from Magnet.

Note 3: FWA lines were revised for Q4 2021 following revisions from Digital Forge.

Note 4: FTTP & VDSL lines were revised for Q1 2022 following revisions received from Ivertec.

Note 5: FTTP, FWA & Satellite lines were revised for Q3 2021 and Q1 2022 following revisions received from Viatel.

Note 6: Single Play Fixed Telephony subscriptions increased by 50% following revisions received from Viatel.

Note 7: Crossan Cable figures for VOB, Standalone & Bundles subscriptions were estimated for Q2 2022.

Note 8: Vodafone mobile data traffic was estimated for Q2 2022 due to system issues.

Note 9: Ivertec broadband data traffic was estimated due to system issues.

Note 10: Other revenues increased by approximately 700k for Q1 2022 following revisions from EU Networks.

Note 11: PSTN voice minutes increased by 56k for Q1 2022 following revisions received from Voxbone.

Note 12: Retail leased line revenues were revised between 55k – 5.2m for Q1 2021 – Q1 2022 following revisions from Verizon.

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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) .