An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q2 2023

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 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 2023 to 30th June 2023. The report is based on submissions from 50 active operators.

The report contains the following key charts/data:

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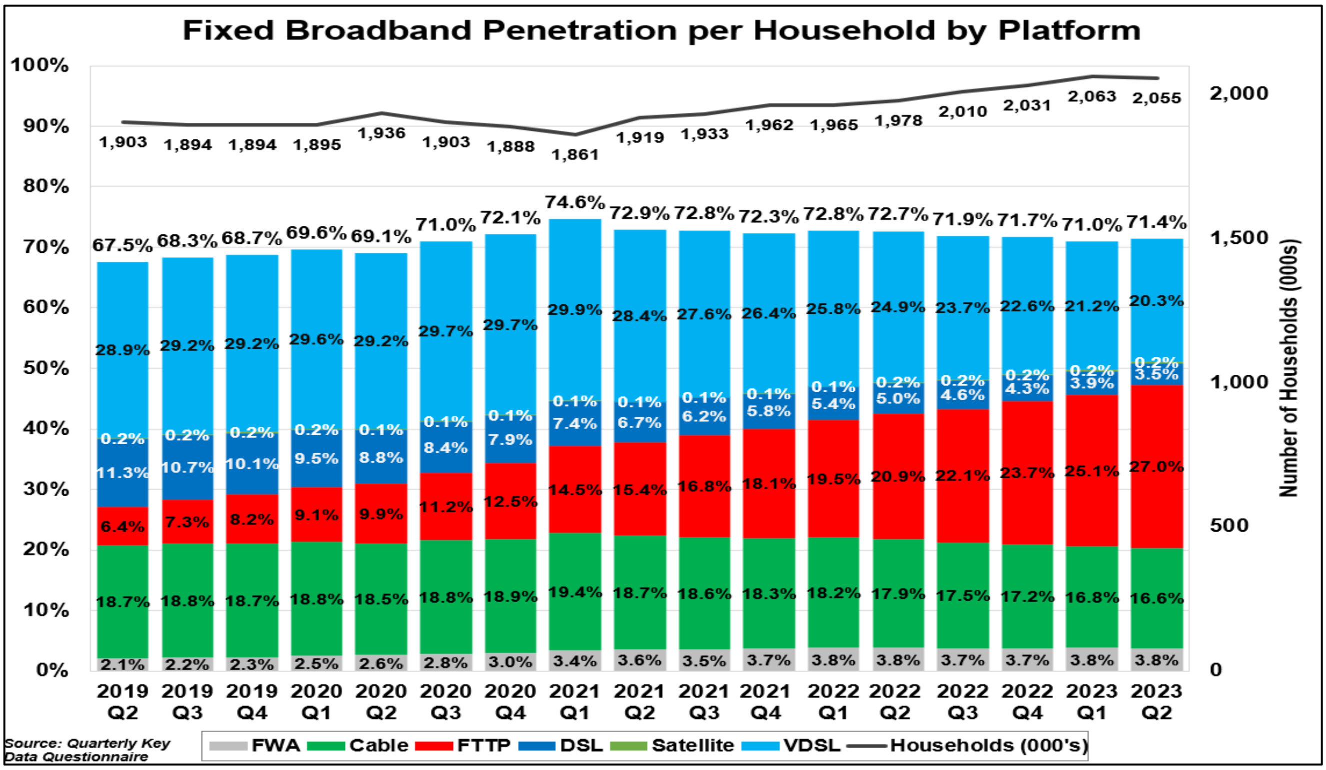
2 Q2 2023 Key Quarterly Trends

Total Broadband Subscriber Lines	Total Retail Market Revenue	FTTP Subscriber Lines	5G Mobile Subscribers(Incl. MBB & M2M)
2.0m	**910m**	**577k**	**1.28m**
(+0.2% QoQ)	(+2.8% QoQ)	(+7.4% QoQ)	(+13.6% QoQ)
(+1.5% YoY)	(+5.2% YoY)	(+33.7% YoY)	(+80% YoY)



Quarterly Trends

Fixed Voice Traffic Minutes	(11%)
Broadcasting Revenues	(5%)
VOIP Minutes	(8%)
Mobile 3G Subscriptions	(10%)
Mobile 3G Domestic Traffic	(17%)

FTTP Broadband Subscriber Lines	7%
FTTP Broadband Traffic	2%
Broadband Subscriber Lines >=500Mbps	3%
5G Mobile Subscriptions	14%
5G Mobile Traffic	28%

3 Overview of Irish Communications Market Q2 2023

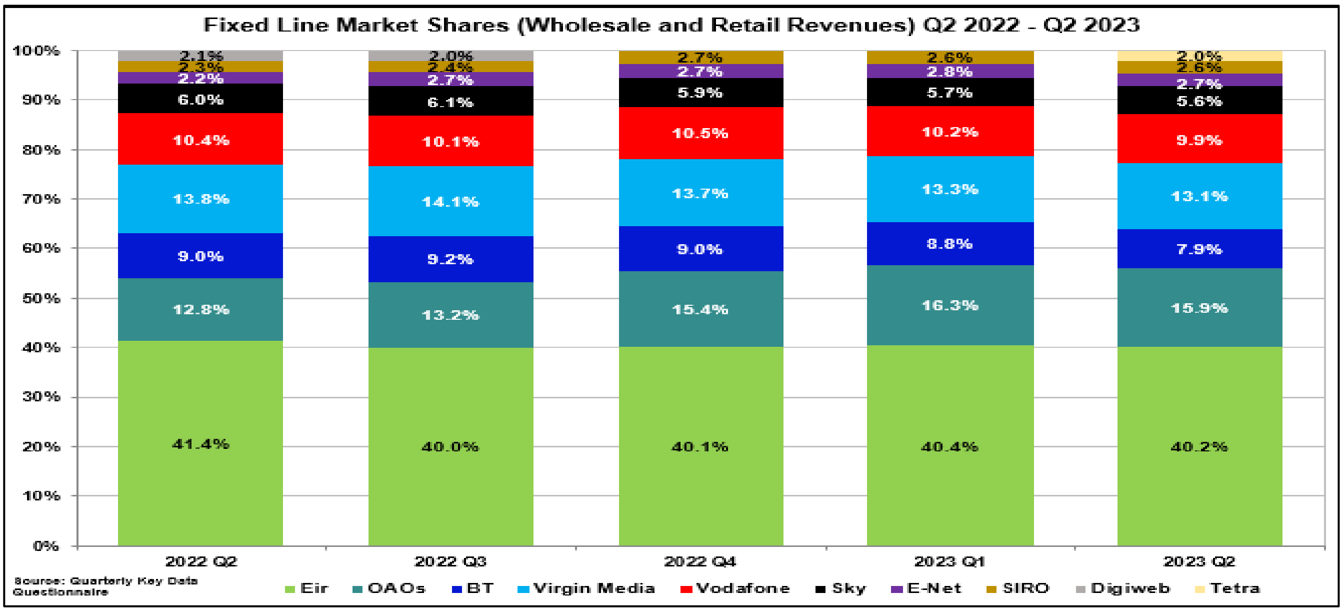
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q2 2023				
	Q1 2023	**Q2 2023**	**Quarterly Change**	**Annual Change**
Total Retail Market Revenues	€885,551,755	€910,085,000	2.8%	5.2%
Fixed Line Retail Revenues	€331,244,000	€351,828,000	6.2%	10.8%
Mobile Retail Revenues	€412,916.755	€424,420,000	2.8%	6.5%
Broadcasting Retail Revenues	€141,391,000	€133,837,000	-5.3%	-10.2%
Fixed Line Wholesale Revenues	€149,986,000	€148,641,000	-0.9%	4.9%
Mobile Wholesale Revenues	€32,471,000	€35,546,905	9.5%	2.0%
Total Voice Traffic (Minutes)	2.958,228,000	2,790,773,505	-5.7%	-24.3%
Fixed Voice Traffic (Minutes)	362,291,000	320,909,000	-11.4%	-25.7%
Mobile Voice Traffic (Minutes)	2,595,937,000	2,469,865,000	-4.9%	-24.1%
Fixed Broadband Subscriber Lines	1,617,844	1,622,165	0.3%	1.7%
Total Fixed Subscriber Lines	2,400,010	2,381,407	-0.8%	10.0%
Fixed Voice Subscriber Lines	1,228,979	1,227,892	-0.1%	-2.3%
Total Mobile Subscriptions	9,057,782	9,292,295	2.6%	11.3%
Machine to Machine Subscriptions	3,056,326	3,249,528	6.3%	30.4%
Mobile Broadband Subscriptions	383,919	382,797	-0.3%	0.7%
Mobile Voice Subscriptions	5,617,537	5,659,970	0.8%	3.4%
Total Fixed Broadband Data Traffic (GB)	1,883,524,926	1,810,713,392	-3.9%	15.4%
Mobile Broadband (Dongles) Data Traffic (GB)	86,196,830	83,984,975	-2.6%	-7.1%
Standard Mobile Subscriptions Data Traffic (GB)	226,596,557	231,009,890	1.9%	16.2%
Total Mobile Domestic Data Traffic (GB)	353,213,811	366,601,759	3.8%	19.1%

Fixed Market

- In Q2 2023, Eir had the highest revenue share (retail and wholesale) in the fixed market at 40.2%.
- ComReg estimates that the next seven largest operators (Virgin Media Ireland, Vodafone (fixed only), BT Ireland, Sky Ireland, E-Net & SIRO) contribute a further 41.81% share of total industry revenue.
- Other Authorised Operators (OAOs) account for the remaining 15.9% share.

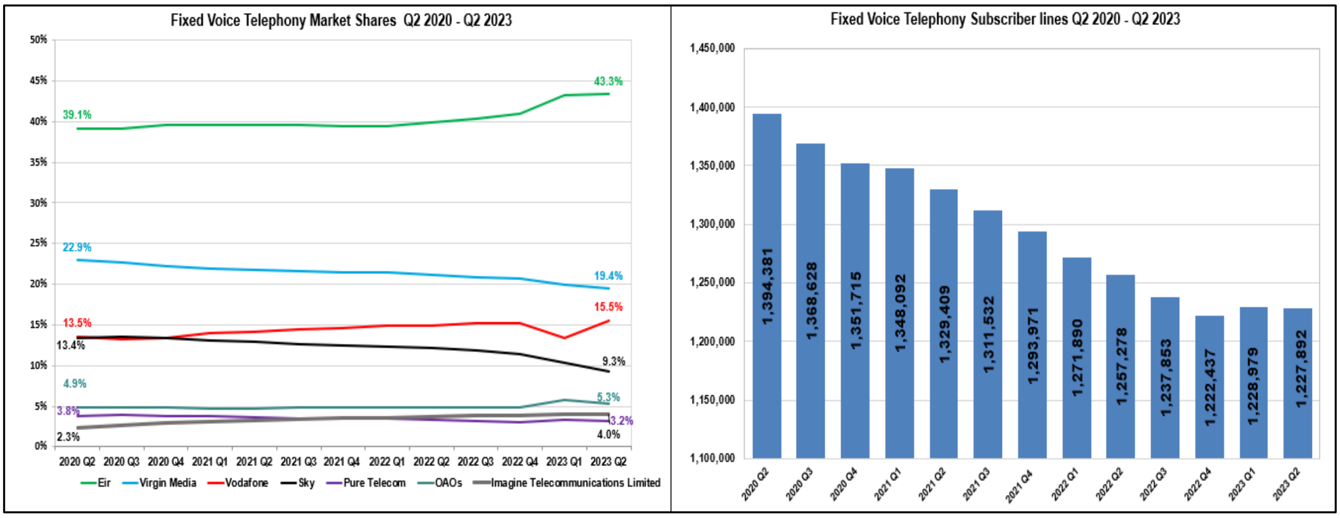
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



4 Retail Fixed Voice Market

Fixed voice traffic in Q2 2023 was almost 321 million minutes, which was an 11.4% decrease on Q1 2023 and a decrease of 25.7% since Q2 2022.

Figure 2 – Retail Fixed Voice Subscriber lines



- At the end of Q2 2023 there were 1,227,892 fixed voice subscriber lines (a decrease of 0.1% since Q1 2023 and a decrease of 2.3% on Q2 2022).
- As of Q2 2023 Eir had 43.3% of all fixed voice subscriber lines followed by Virgin Media (19.4%), Vodafone (15.5%), Sky (9.3%), Imagine Telecommunications Limited (4.0%) & Pure Telecom (3.2%). OAOs accounted for the remaining 5.3% of fixed voice subscriber lines.

5 Retail Broadband Market

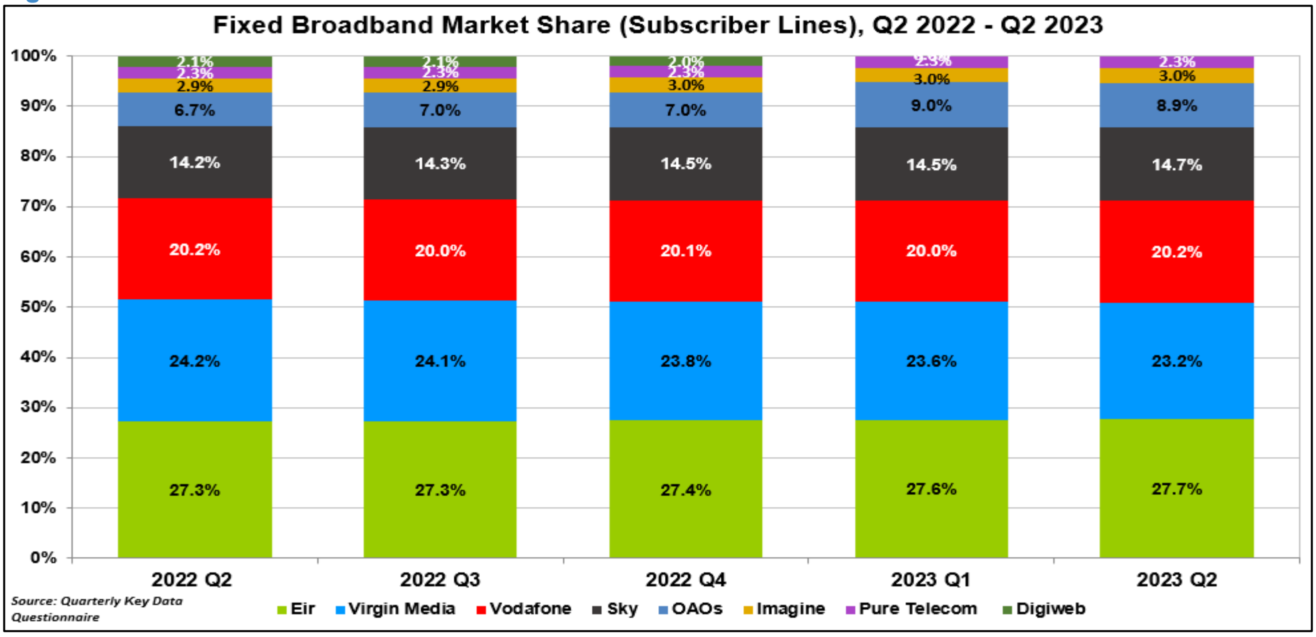
At the end of June 2023, there were 2 million active broadband subscriber lines in Ireland. This is 0.2% increase from the previous quarter and a 1.5% increase on Q2 2022.

Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q2 2023	Quarterly Change Q1'23 – Q2'23	Annual Change Q2'22 – Q2'23
Cable Broadband	359,669	-1.6%	-3.4%
DSL Broadband	100,683	-8.0%	-24.0%
VDSL Broadband	493,492	-4.0%	-13.6%
FTTP Broadband	576,856	7.4%	33.7%
Satellite Broadband	5,295	13.9%	60.6%
FWA Broadband	86,170	-0.9%	2.2%
Total Fixed Broadband	1,622,165	0.3%	1.7%
Mobile Broadband	382,797	-0.3%	0.7%
Total Broadband	2,004,962	**0.2%**	**1.5%**

- FTTP (+7.4%), and Satellite (+13.9%) showed positive growth this quarter. VDSL (-4%), DSL (-8%), Cable (-1.6%) FWA (-0.9%) and Mobile Broadband (-0.3%) subscriber lines all fell this quarter.

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



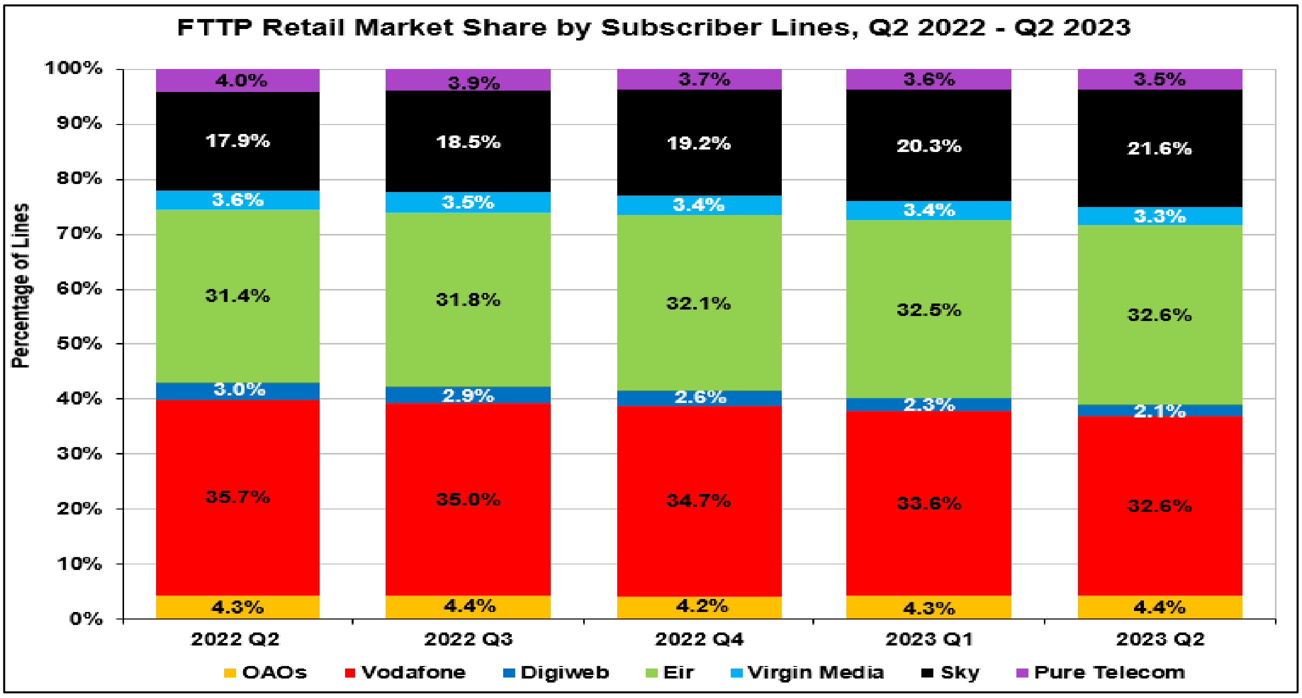
- In Q2 2023, Eir had 27.7% of total retail fixed broadband subscriber lines, followed by Virgin Media who had 23.2% of lines. Vodafone had 20.2% (excluding mobile broadband), Sky Ireland 14.7%, Imagine 3.0%, Pure Telecom 2.3%.
- All other OAOs combined accounted for the remaining 8.9% share of retail fixed broadband subscriber lines.

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

Fixed Broadband Subscriber Lines by Sold Speed	Q1 2023	Q2 2023	Quarterly Change
<2Mbps - 9.99Mbps	4.1%	3.8%	-0.4%
=10Mbps - 29.99Mbps	5.9%	5.5%	-0.4%
=30Mbps - 99.99Mbps	30.9%	29.7%	-1.2%
=100Mbps - 499.99Mbps	24.9%	24.1%	-0.8%
=500Mbps - 999.99Mbps	25.3%	27.5%	+2.2%
>=1GB	8.9%	9.5%	+0.5%

- In Q2 2023 61% of all fixed broadband subscriber lines had sold speeds which were equal to or greater than 100Mbps, with 37% having sold speeds equal to or greater than 500Mbps.

Figure 4 - FTTP Subscriber Line Market Share

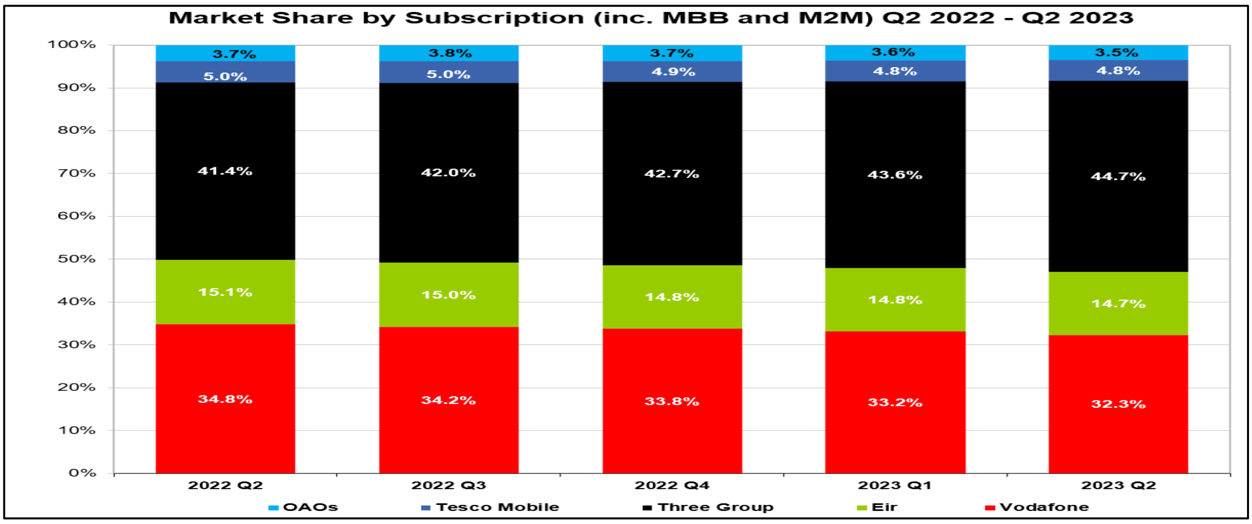


- In Q2 2023, Vodafone and Eir each had 32.6% of retail FTTP subscriber lines, followed by Sky Ireland at 21.6%, Pure Telecom at 3.5%, Virgin Media at 3.3%, and Digiweb at 2.1% market share. OAOs accounted for the remaining 4.4%.

6 Mobile Market

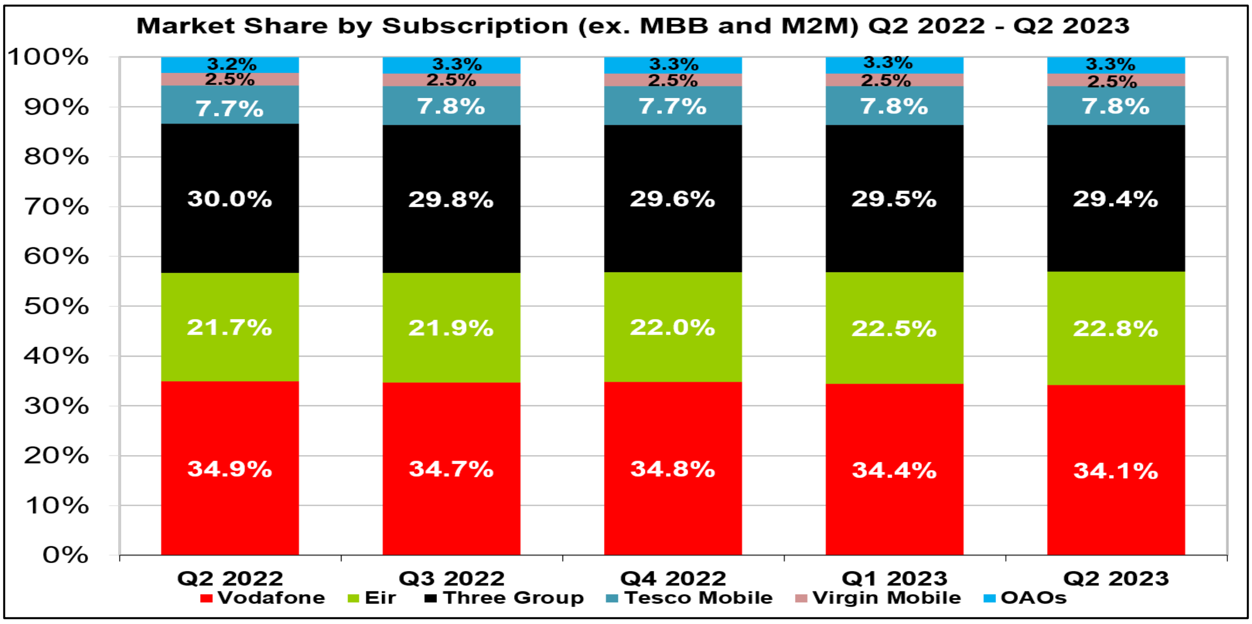
At the end of Q2 2023 there were 9,292,295 mobile subscriptions in Ireland, including mobile broadband ('MBB') and Machine to Machine ('M2M'). If mobile broadband subscriptions (382,797) and M2M subscriptions (3,249,528) are excluded, the total number of mobile subscriptions was 5,659,970.

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



- In Q2 2023 Three had the largest share of mobile subscriptions including MBB and M2M at 44.7%. This was followed by Vodafone with 32.3%, Eir with 14.7%, Tesco Mobile at 4.8% and OAOs at 3.5%.
- In Q2 2023 Vodafone had the highest market share excluding mobile broadband and M2M (34.1%), followed by Three (29.4%), Eir (22.8%), Tesco Mobile (7.8%), Virgin Mobile (2.5%) and OAOs (3.3%).
- There were 1,986,725 2G, 917,535 3G, 5,100,322 4G and 1,287,713 5G mobile subscriptions in Q2 2023.

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



7 Corrigendum to Q1 2023 – Q1 2020

Note 1: Mobile minutes were estimated for Q1 2023 by Vodafone due to system issues. The Q1 minutes have been updated to actual minutes.

Note 2: Mobile subscriptions were revised by Vodafone due to the inclusion of inactive subscriptions historically and updates to systems which identified errors, which led to revisions for Q1 2022 – Q1 2023.

Note 3: Mobile traffic has been revised by Vodafone due to a calculation issue for Q1 2020 – Q4 2020, Q1 2023 & Q1 2022 – Q4 2022.

Note 4: Mobile termination of call minutes originated on net revised down by Vodafone for Q1 2023.

Note 5: Single Play Subscriber lines revised down by Vodafone for Q1 2023.

Note 6: Leased lines revenue revised down by Host for Q4 2021 & Q4 2022 due to system issues.

Note 7: Eurona Brisknet revised revenue down for Q1 2023.

Note 8: Digiweb revised revenue, call origination minutes & FWA traffic for Q1 2023.

Note 9: Welltel revised revenue due to system issues for Q1 2023.

Note 10: Three revised mobile data traffic for Q4 2020.

Note 11: Magnet+ revised voice traffic for Q1 2023.

Note 12: BT Ireland revised voice traffic for Q1 2023.

Note 13: Fixed Voice call minutes were estimated for Q1 2023. Actual minutes have been used for Q1 2023 & Q2 2023 with the exception of further possible updates from two operators who are working to address the data collection issues.

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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