An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Date: 10/12/2020

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q3 2020

QKDR DATA PORTAL

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www.comreg.ie/industry/electronic-communications/data-portal

Reference: ComReg 20/119

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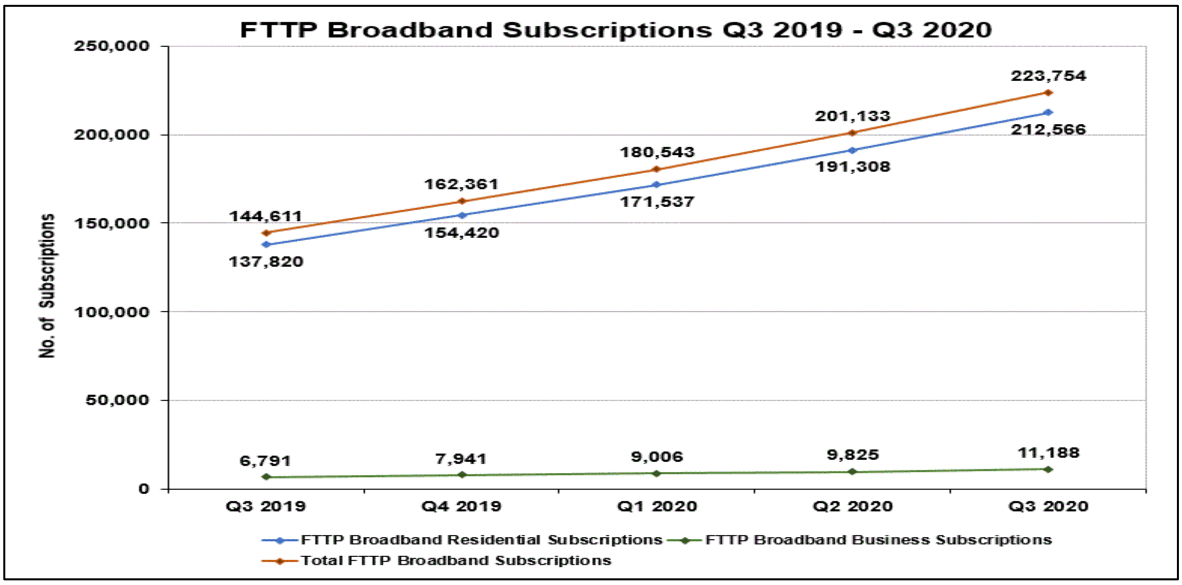
Q3 2020 Key Quarterly Trends

63% - YoY increase in Fixed Broadband Traffic

4% - YoY increase in Broadband Subscriptions

223k - Total FTTP Broadband Subscriptions

4.7% - QoQ increase in Mobile Retail Revenues



Fixed broadband traffic decreased by 1.9% QoQ

Mobile minutes increased by 6.3% QoQ

VOB minutes account for 23% of Total Voice Minutes

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, 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 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 July 2020 to 30th September 2020. The report is based on submissions from 45 active operators.

The report contains the following key charts/data

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  - Fixed Voice
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- Mobile Market
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Overview of Irish Communications Market Q3 2020

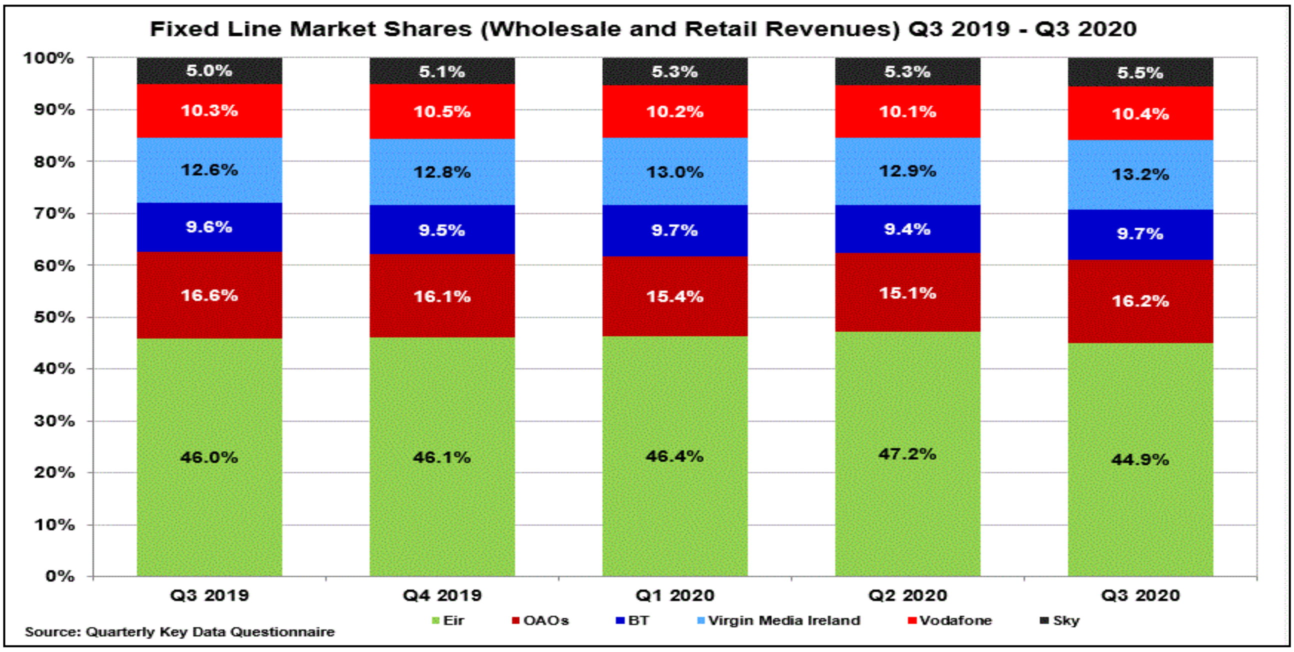
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q3 2020				
	Q3 2020	Q2 2020	Quarterly Change	Annual Change
Total Retail Market Revenues	€879,772,718	€846,384,930	3.9%	0.9%
Fixed Line Retail Revenues	€336,418,251	€339,854,930	-1.0%	-2.4%
Mobile Retail Revenues	€398,002,000	€380,223,000	4.7%	-0.1%
Broadcasting Retail Revenues	€145,352.467	€126,307,000	15.1%	0.0%
Fixed Line Wholesale Revenues	€128,702.547	€128,456,187	0.2%	-1.0%
Mobile Wholesale Revenues	€38,084.000	€38,466,000	-1.0%	-18.3%
Total Voice Traffic (Minutes)	4,085,544.570	4,468,333.044	-8.6%	10.2%
Fixed Voice Traffic (Minutes)	638,466.000	724,479,867	-11.9%	2.8%
Mobile Voice Traffic (Minutes)	3,447,078.570	3,743,853.177	-7.9%	11.7%
Fixed Broadband Subscriptions	1,506,832	1,494,217	0.8%	3.6%
Fixed Subscriptions	2,213,319	2,215,093	-0.1%	-0.3%
Fixed Voice Subscriptions	1,346,511	1,375,126	-2.1%	-5.3%
Total Mobile Subscriptions	6,964,436	6,738,457	3.4%	6.4%
Machine to Machine Subscriptions	1,458,224	1,353,232	7.8%	26.3%
Mobile Broadband Subscriptions	323,530	317,975	1.7%	5.5%
Mobile Voice Subscriptions	5,182,682	5,067,250	2.3%	1.9%
Total Mobile Data Volumes	211,573	181,339	16.7%	49.5%

Fixed Market

- In Q3 2020, Eir had the highest revenue share in the fixed market with a 44.9% market share.
- ComReg estimates that the next four largest operators (BT Ireland, Sky Ireland, Virgin Media Ireland and Vodafone (fixed only)) contribute a further 38.9% share of total (retail and wholesale) industry revenue, while Other Authorised Operators (OAOs) account for the remaining 16.2% share.

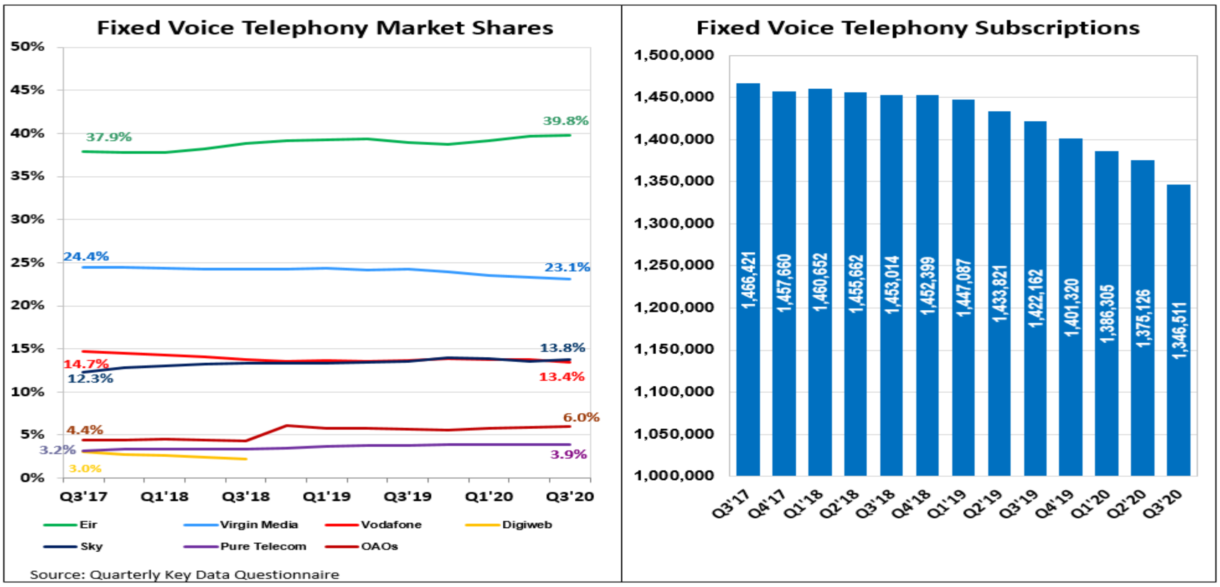
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Fixed voice traffic in Q3 2020 was over 638 million minutes, which was a 11.9% decrease on Q2 2020 and an increase of 2.8% since Q3 2019. Managed voice over broadband (VoB) minutes account for approximately 22.7% of total fixed voice minutes, up from 20.0% in Q3 2019.

Figure 2 – Retail Fixed Voice Subscriptions



- At the end of Q3 2020 there were 1,346,511 fixed voice subscriptions (a decrease of 2.1% since Q2 2020 and a decrease of 5.3% on Q3 2019).
- As of Q3 2020 Eir had 39.8% of all fixed voice subscriptions followed by Virgin Media (23.1%), Vodafone (13.4%), Sky (13.8%) and Pure Telecom (3.9%). OAOs accounted for the remaining 6.0% of fixed voice subscriptions.

Retail Broadband Market

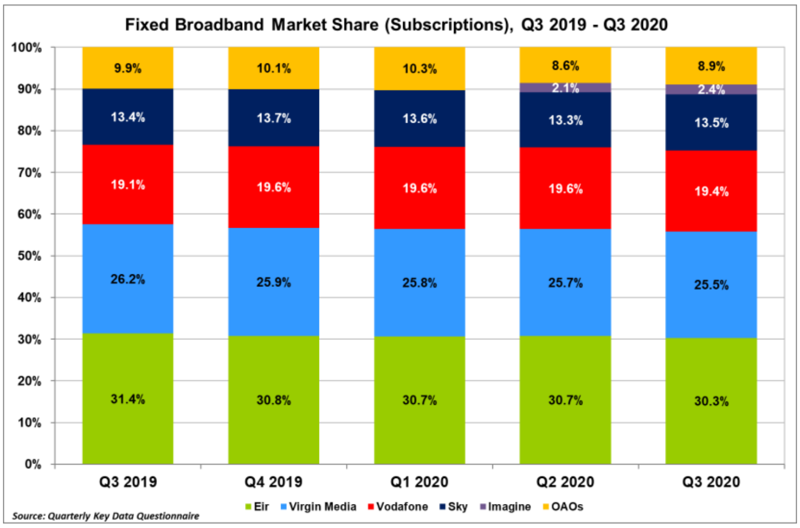
At the end of September 2020, there were 1.830 million active broadband subscriptions in Ireland. This was an increase of 1.0% on the previous quarter and a 3.9% increase on Q3 2019.

Table 2 - Total Number of Active Broadband Subscriptions

Subscription Type	Q3 2020	Quarterly Growth Q2'20 – Q3'20	Annual Growth Q3'19 – Q3'20
DSL Broadband	202,109	-6.1%	-20.1%
VDSL Broadband	645,125	0.2%	2.3%
Cable Broadband	374,225	0.0%	0.2%
FTTP Broadband	223,754	11.2%	54.7%
Satellite Broadband	2,908	-5.8%	-26.5%
FWA Broadband	58,711	4.1%	18.5%
Total Fixed Broadband	1,506,832	0.8%	3.6%
Mobile Broadband	323,530	1.7%	5.5%
Total Broadband	**1,830,362**	**1.0%**	**3.9%**

- Subscriptions for VDSL (+0.2%), FTTP (+11.2%), FWA (+4.1%) and Mobile Broadband (1.7%) showed positive growth this quarter. DSL (-6.1%) and Satellite (-5.8%) subscriptions both fell this quarter. Cable subscriptions remained the same.

Figure 3 – Retail Fixed Broadband Market Shares based on Subscriptions



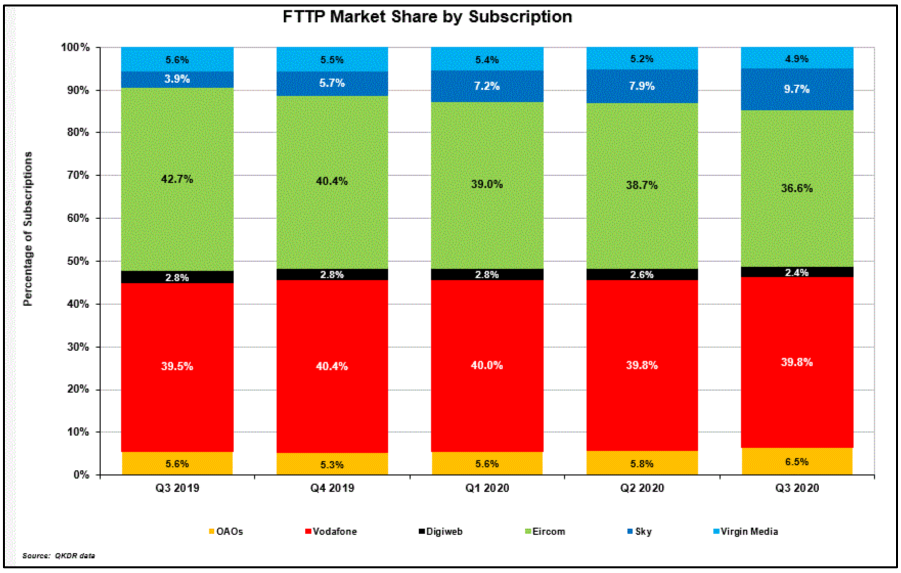
- In Q3 2020, Eir had 30.3% of total retail fixed broadband subscriptions, followed by Virgin Media who had 25.5% of subscriptions. Vodafone had 19.4% (excluding mobile broadband subscriptions), while Sky Ireland and Imagine had had a 13.5% and 2.4% market share respectively.
- All other OAOs combined accounted for the remaining 8.9% share of retail fixed broadband subscriptions.

Table 3 - Retail Fixed Broadband Subscriptions by Sold Download Speed

Fixed Broadband Subscriptions by Sold Speed	Q3 2020	Q2 2020	Quarterly Change
<2Mbps	0.7%	0.8%	-0.1%
2Mbps – 9.99Mbps	7.7%	8.2%	-0.5%
=10Mbps – 29.99bps	11.3%	11.8%	-0.5%
=30Mbps – 99.99Mbps	39.6%	39.8%	-0.2%
>=100Mbps	40.8%	39.4%	1.4%

- 80.4% of all fixed broadband subscriptions were equal to or greater than 30Mbps in Q3 2020.

Figure 4 - FTTP Subscription Market Share

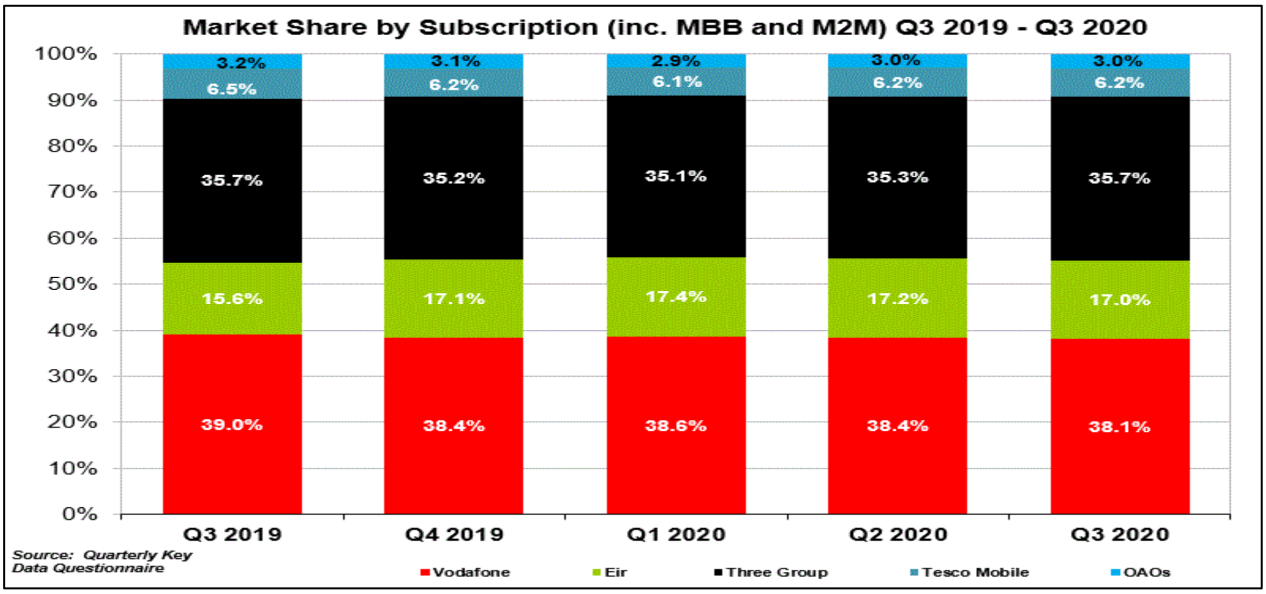


- In Q3 2020, Vodafone had 39.8% of retail FTTP subscriptions, followed by Eir at 36.6%, Virgin Media at 4.9%, Sky Ireland at 9.7% and Digiweb a 2.4% market share.
- OAOs combined accounted for the remaining 6.5% market share.

Mobile Market

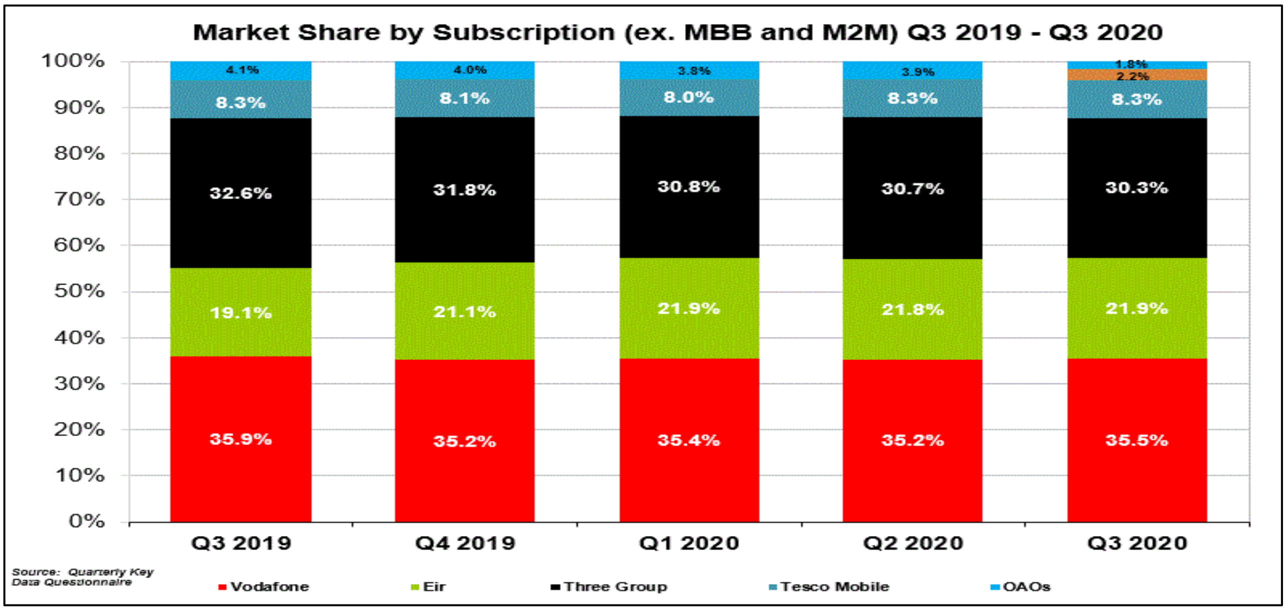
At the end of Q3 2020 there were 6,964,436 mobile subscriptions in Ireland, including mobile broadband and Machine to Machine ('M2M'). If mobile broadband subscriptions (323,530) and M2M subscriptions (1,458,224) are excluded, the total number of mobile subscriptions was 5,182,682.

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



- In Q3 2020 Vodafone had the largest share of mobile subscriptions including MBB and M2M at 38.1%, this was followed by Three with 35.7%, Eir with 17.0%, Tesco Mobile at 6.2% and OAOs at 3.0% of the market.

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



- In Q3 2020 Vodafone had the highest market share excluding mobile broadband and M2M (35.5%), followed by Three Group (30.3%), Eir (21.9%) and Tesco Mobile (8.3%). Virgin Mobile has surpassed the 2% market share threshold in Q3 2020 with a 2.2% market share.

Corrigendum to Q4 2018 QKDR – Q2 2020 QKDR

Note 1: Retail Domestic Voice Minutes and Retail Domestic SMS traffic were revised for Q2 2020 following revisions from Tesco Mobile Ireland. Total Voice Traffic, Total Mobile Voice Minutes and Mobile SMS traffic were impacted by these revisions.

Note 2: International roaming SMS and MMS traffic and Retail International Roaming Data Traffic were revised for Q2 2020 following revisions from Three Ireland. Roaming Data Traffic was impacted by these revisions.

Note 3: Retail International Roaming data revenues were revised for Q1 2020 and Q2 2020 following revisions from Virgin Media Ireland. Mobile Retail Revenues, Mobile Data Revenues and Total Retail Market Revenues were impacted by these revisions.

Note 4: Broadband Revenues (DSL, VDSL & FTTP) were revised for Q4 2018 – Q2 2020 following revisions from Vodafone. Fixed Broadband Retail Revenues, Market Share by Fixed Line Retail and Wholesale Revenue and Market Share by Fixed Line Retail Revenue 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 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 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 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) .