An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Date: 09/12/2021

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q3 2021

QKDR DATA PORTAL

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Reference: **ComReg 21/125**

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

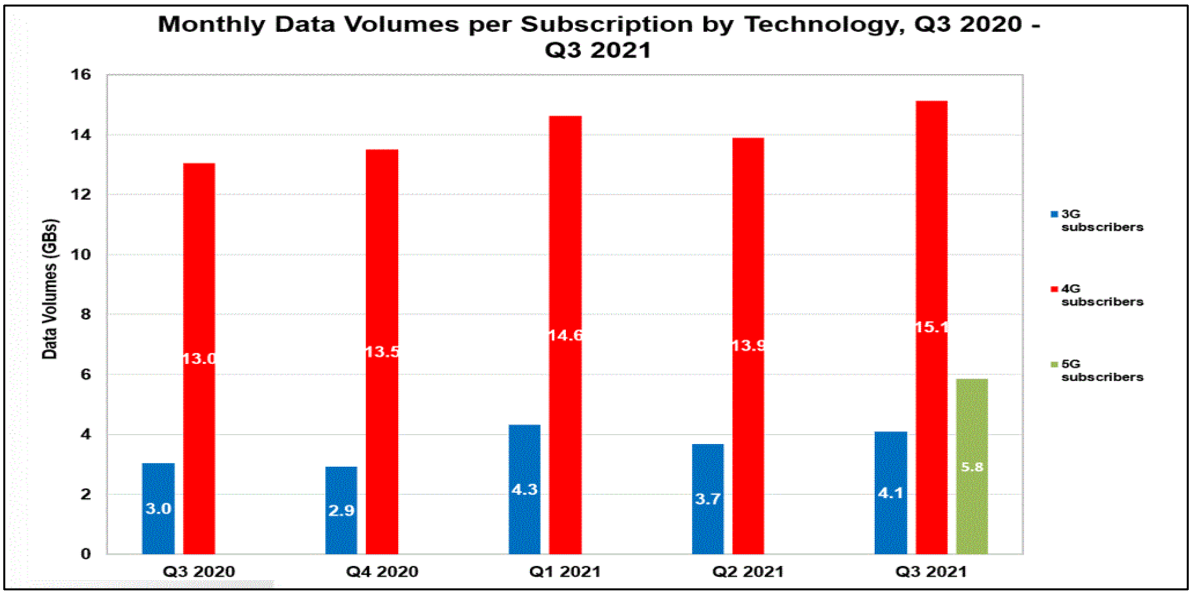
Q3 2021 Key Quarterly Trends

340k (+10%) Total FTTP broadband subscriptions

13% Decrease in Residential fixed voice minutes

11% Increase in M2M subscriptions

299k 5G Mobile subscriptions (Voice & MBB)



Roaming Data Traffic increased by 114% QoQ

Total Mobile Data Traffic increased by 17% QoQ

Total FWA Broadband Subscriptions increased by 2% QoQ to 77k

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 2021 to 30th September 2021. The report is based on submissions from 49 active operators.

The report contains the following key charts/data

- Overview of Markets
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- Fixed Markets
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- Mobile Market
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Overview of Irish Communications Market Q3 2021

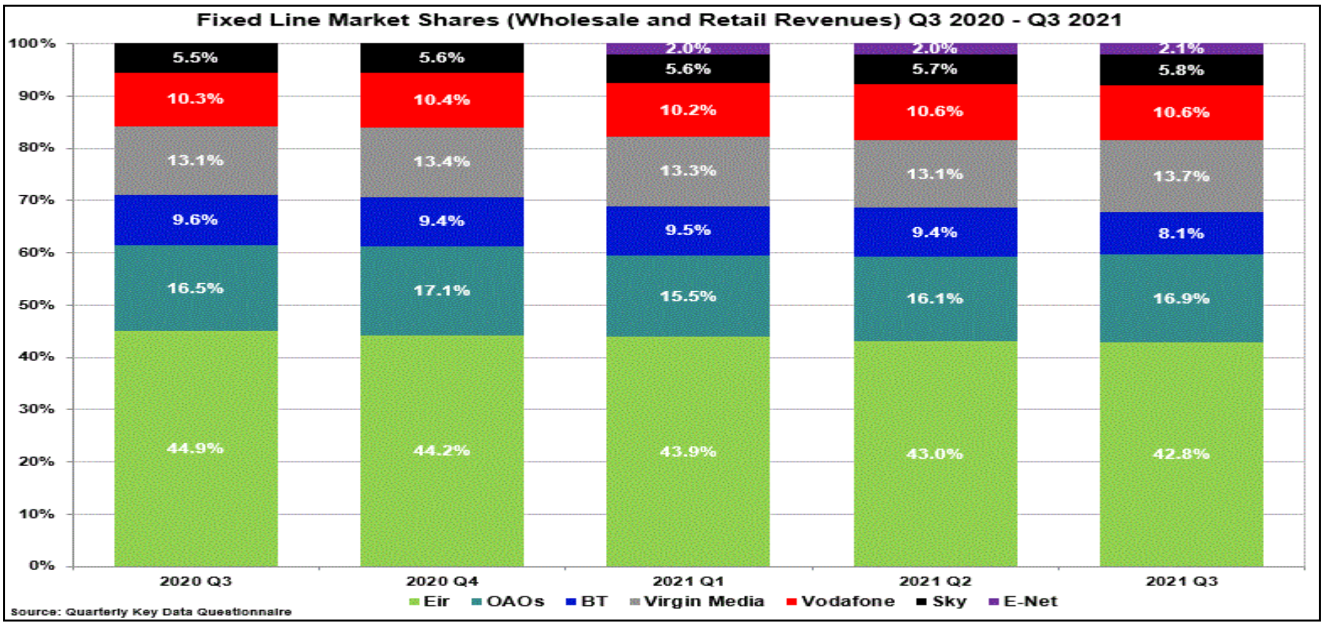
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q3 2021				
	Q2 2021	Q3 2021	Quarterly Change	Annual Change
Total Retail Market Revenues	€852,534,118	€862,713,458	1.2%	-2.0%
Fixed Line Retail Revenues	€327,428,699	€320,845,119	-2.0%	-4.8%
Mobile Retail Revenues	€381,991,526	€394,067,530	3.2%	-1.0%
Broadcasting Retail Revenues	€143,113,892	€147,800,809	3.3%	1.7%
Fixed Line Wholesale Revenues	€138,066,986	€136,846,590	-0.9%	6.3%
Mobile Wholesale Revenues	€35,559,000	€38,911,000	9.4%	2.2%
Total Voice Traffic (Minutes)	4,145,568,068	3,930,684,853	-5.2%	-3.8%
Fixed Voice Traffic (Minutes)	567,531,791	513,959,000	-9.4%	-19.5%
Mobile Voice Traffic (Minutes)	3,578,036,277	3,416,725,853	-4.5%	-0.9%
Fixed Broadband Subscriptions	1,554,642	1,566,462	0.8%	3.9%
Fixed Subscriptions	2,242,845	2,200,749	-1.9%	-0.6%
Fixed Voice Subscriptions	1,366,536	1,311,532	-4.0%	-4.2%
Total Mobile Subscriptions	7,365,441	7,639,331	3.7%	9.7%
Machine to Machine Subscriptions	1,792,432	1,990,167	11.0%	36.5%
Mobile Broadband Subscriptions	340,962	348,396	2.2%	7.7%
Mobile Voice Subscriptions	5,232,047	5,300,768	1.3%	2.3%
Total Fixed Broadband Data Traffic (GB)	1,511,002,388	1,463,637,045	-3.1%	8.7%
Mobile Broadband (Dongles) Data Traffic (GB)	68,469,206	76,244,510	11.4%	34.1%
Standard Mobile Subscriptions Data Traffic (GB)	159,830,854	184,030,332	15.1%	35.2%
Total Mobile Data Volumes (GB)	229,221	267,579	16.7%	32.8%

Fixed Market

- In Q3 2021, Eir had the highest revenue share in the fixed market with a 42.8% market share. ComReg estimates that the next five largest operators (BT Ireland, Sky Ireland, Virgin Media Ireland, Vodafone (fixed only) and E-Net) contribute a further 40.3% share of total (retail and wholesale) industry revenue, while Other Authorised Operators (OAOs) account for the remaining 16.9% share.

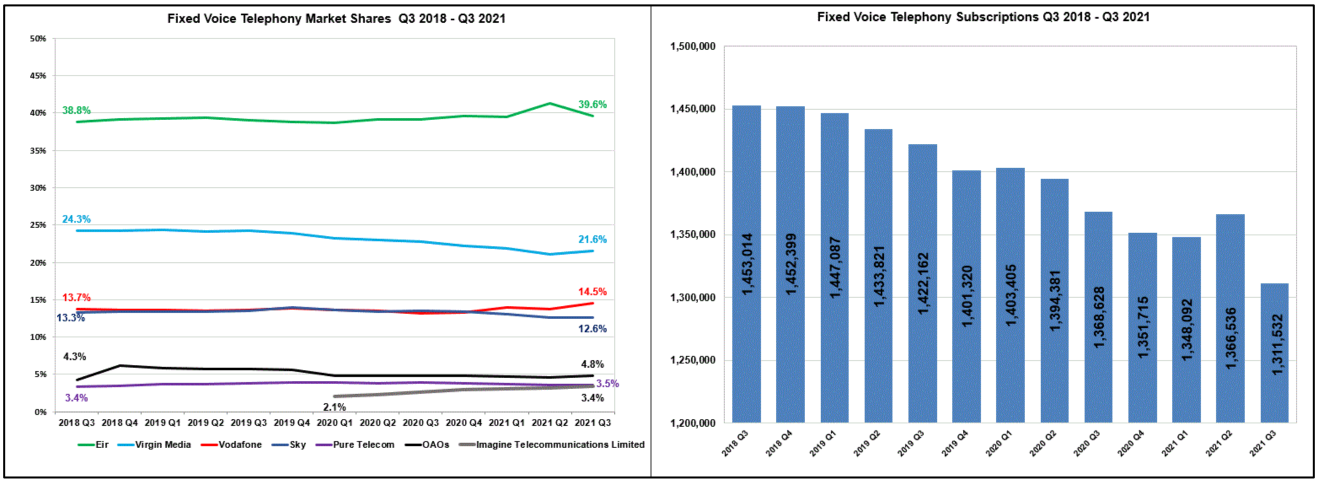
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Fixed voice traffic in Q3 2021 was over 514 million minutes, which was a 9.4% decrease on Q2 2021 and a decrease of 19.5% since Q3 2020. Managed voice over broadband (VoB) minutes account for approximately 27.3% of total fixed voice minutes, up from 22% in Q3 2020.

Figure 2 – Retail Fixed Voice Subscriptions



- At the end of Q3 2021 there were 1,311,532 fixed voice subscriptions (a decrease of 4.03% since Q2 2021 and a decrease of 4.17% on Q3 2020).
- As of Q3 2021 Eir had 39.6% of all fixed voice subscriptions followed by Virgin Media (21.6%), Vodafone (14.5%), Sky (12.6%), Pure Telecom (3.5%) & Imagine Telecommunications Limited (3.4%). OAOs accounted for the remaining 4.8% of fixed voice subscriptions.

Retail Broadband Market

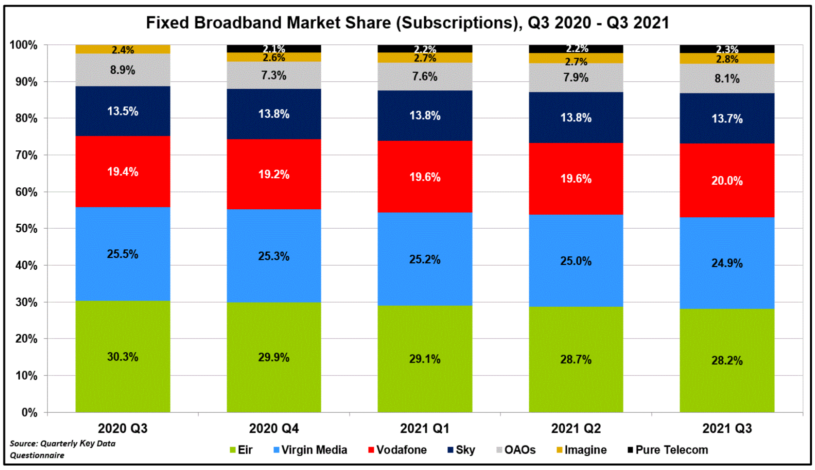
At the end of September 2021, there were 1.91 million active broadband subscriptions in Ireland. This was an increase of 1% on the previous quarter and a 4.6% increase on Q3 2020.

Table 2 - Total Number of Active Broadband Subscriptions

Subscription Type	Q3 2021	Quarterly Growth Q2'21 – Q3'21	Annual Growth Q3'20 – Q3'21
DSL Broadband	156,258	-5.65%	-22.69%
VDSL Broadband	612,743	-2.03%	-5.02%
Cable Broadband	377,530	0.15%	0.88%
FTTP Broadband	340,811	10.32%	52.32%
Satellite Broadband	1,912	-8.03%	-34.25%
FWA Broadband	77,208	2.16%	30.96%
Total Fixed Broadband	1,566,462	0.76%	3.94%
Mobile Broadband	348,396	2.23%	7.69%
Total Broadband	**1,914,858**	**1.03%**	4.60%

- Subscriptions for FTTP (+10.32%), FWA (+2.16%), Cable (+0.15%) & Mobile Broadband (+2.23%) showed positive growth this quarter. VDSL (-2.03%), DSL (-5.65%) and Satellite (-8.03%) subscriptions all fell this quarter.

Figure 3 – Retail Fixed Broadband Market Shares based on Subscriptions



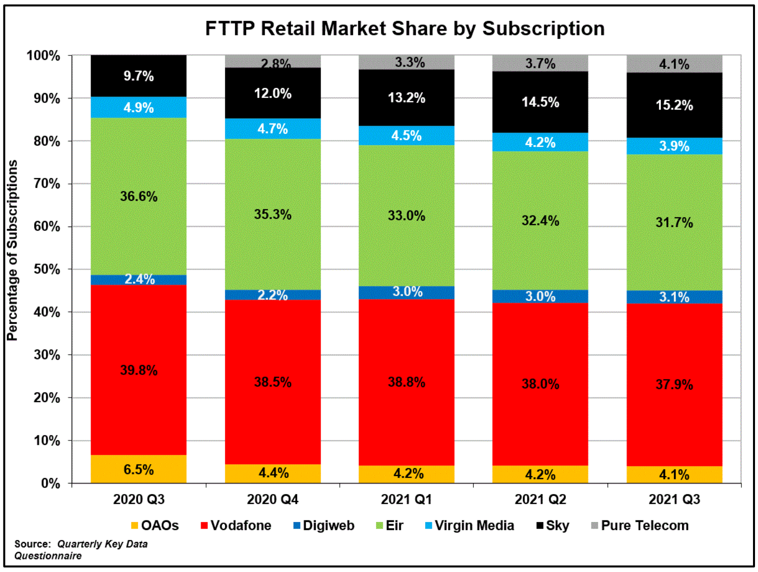
- In Q3 2021, Eir had 28.2% of total retail fixed broadband subscriptions, followed by Virgin Media who had 24.9% of subscriptions. Vodafone had 20.0% (excluding mobile broadband subscriptions), Sky Ireland 13.7% and Imagine and Pure Telecom had 2.8% and 2.3% market share respectively.
- All other OAOs combined accounted for the remaining 8.1% share of retail fixed broadband subscriptions.

Table 3 - Retail Fixed Broadband Subscriptions by Sold Download Speed

Fixed Broadband Subscriptions by Sold Speed	Q3 2021	Q2 2021	Quarterly Change
<2Mbps	0.7%	0.7%	-0.01%
2Mbps – 9.99Mbps	5.4%	6.2%	-0.78%
=10Mbps – 29.99bps	7.7%	9.5%	-1.79%
=30Mbps – 99.99Mbps	37.9%	37.2%	0.69%
>=100Mbps	48.3%	46.4%	1.89%

- 86.2% of all fixed broadband subscriptions were equal to or greater than 30Mbps in Q3 2021.

Figure 4 - FTTP Subscription Market Share

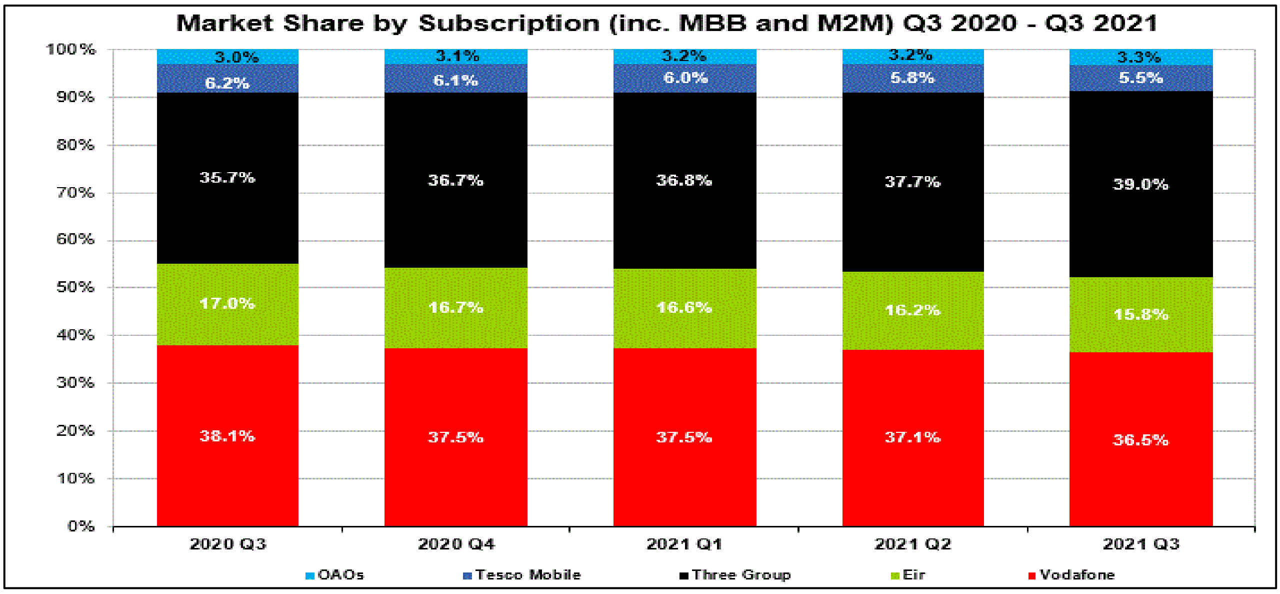


- In Q3 2021, Vodafone had 37.9% of retail FTTP subscriptions, followed by Eir at 31.7%, Sky Ireland at 15.2%, Pure Telecom at 4.1%, Virgin Media at 3.9%, and Digiweb at 3.1% market share.
- OAOs combined accounted for the remaining 4.1% market share.

Mobile Market

At the end of Q3 2021 there were 7,638,611 mobile subscriptions in Ireland, including mobile broadband and Machine to Machine ('M2M'). If mobile broadband subscriptions (348,396) and M2M subscriptions (1,990,167) are excluded, the total number of mobile subscriptions was 5,300,048.

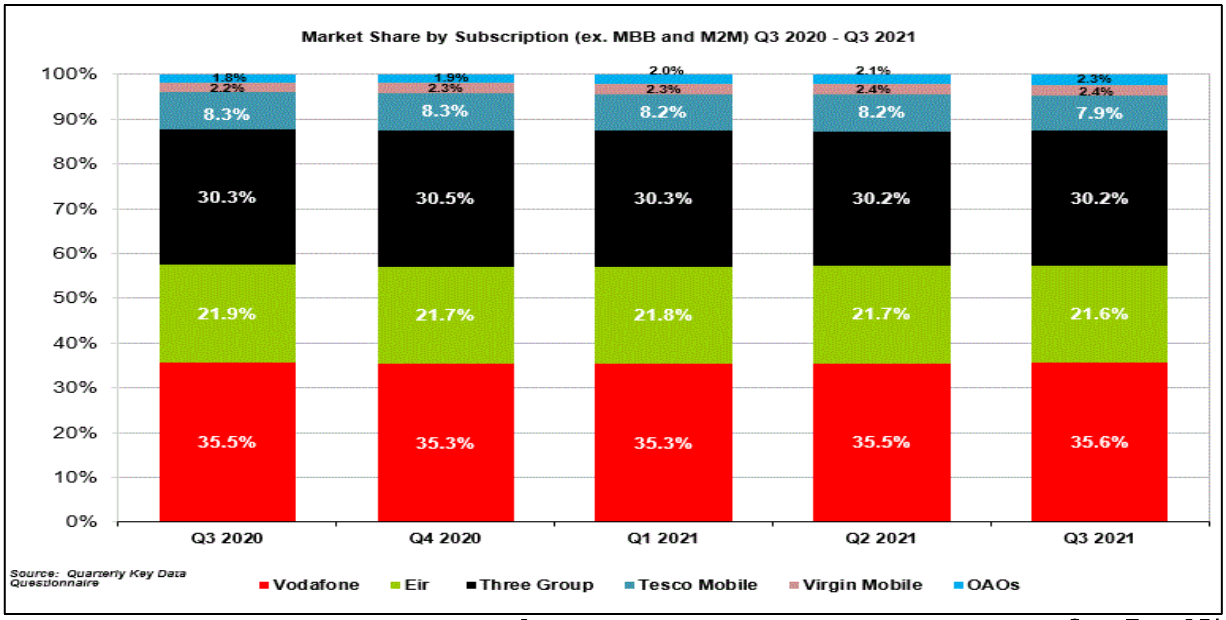
Figure 5 - Market Shares by Subscription including Mobile Broadband and Machine to Machine



- In Q3 2021 Three had the largest share of mobile subscriptions including MBB and M2M at (39.0%). This was followed by Vodafone with (36.5%), Eir with (15.8%), Tesco Mobile at (5.5%) and OAOs at (3.3%).

- In Q3 2021 Vodafone had the highest market share excluding mobile broadband and M2M (35.6%), followed by Three Group (30.2%), Eir (21.6%), Tesco Mobile (7.9%), Virgin Mobile (2.4%) and OAOs (2.3%).
- In Q3 2021 there were 978,588 2G, 1,382,112 3G, 4,980,152 4G and 298,479 5G mobile voice & mbb subscriptions.

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



Corrigendum to Q4 2019 – Q2 2021 QKDR

Note 1: Total Fixed Voice Subscriptions, Fixed Voice Residential Subscriptions, Fixed Voice Business Subscriptions, Single play subs, Double play subs & Market Shares by Fixed Voice Telephony were revised for Q1 2020 - Q2 2021 following revisions from Imagine Telecommunications Limited.

Note 2: Leased Line and Managed Data Retail Revenues & Total Fixed Line Wholesale Revenues were revised for Q3 2020 – Q2 2021 following revisions from Virgin Media Ireland.

Note 3: Leased Line and Managed Data Retail Revenues, Total Fixed Line Retail Revenues, &Total Fixed subscriptions were revised for Q1 2020 – Q2 2021 following revisions from Vodafone Ireland.

Note 4: Total Mobile Data Traffic, MBB Traffic & MBB subscriptions were revised for Q1 2021 – Q2 2021 following revisions from Vodafone Ireland.

Note 5: Voice-Over Broadband Subscriptions, Total Fixed Subscriptions & Total Fixed Voice Subscriptions were revised for Q4 2019 – Q2 2021 following revisions from Fastcom Limited.

Note 6: Total Mobile Retail Revenues were revised for Q2 2021 following revisions from Postfone Mobile.

Note 7: Leased Line and Managed Data Retail Revenues & Total Fixed Line Retail Revenues were revised for Q2 2021 following revisions from Microsoft Ireland limited

Note 8: Total Fixed Broadband Data Traffic (GB) & Satellite Broadband traffic were impacted by estimations used for Europasat for Q1 2021 – Q3 2021 due to data collection issues with their system.

Note 9: Historic fixed line retail revenues are under review for BT Ireland following a change in revenues in Q3 2021.

Other Notes

ComReg has published Mobile 5G subscriber and traffic volumes for the first time in Q3 2021.

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) .