Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q3 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 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 2023 to 30th September 2023. The report is based on submissions from 52 active operators.

The report contains the following key charts/data:

- Overview of Markets
  - Table 1 – Communications Summary
- Fixed Markets
  - Figure 1 – Fixed Line Market Shares based on Wholesale and Retail Revenue
- Fixed Voice
  - Figure 2 – Retail Fixed Voice Subscriber lines
- Broadband Market
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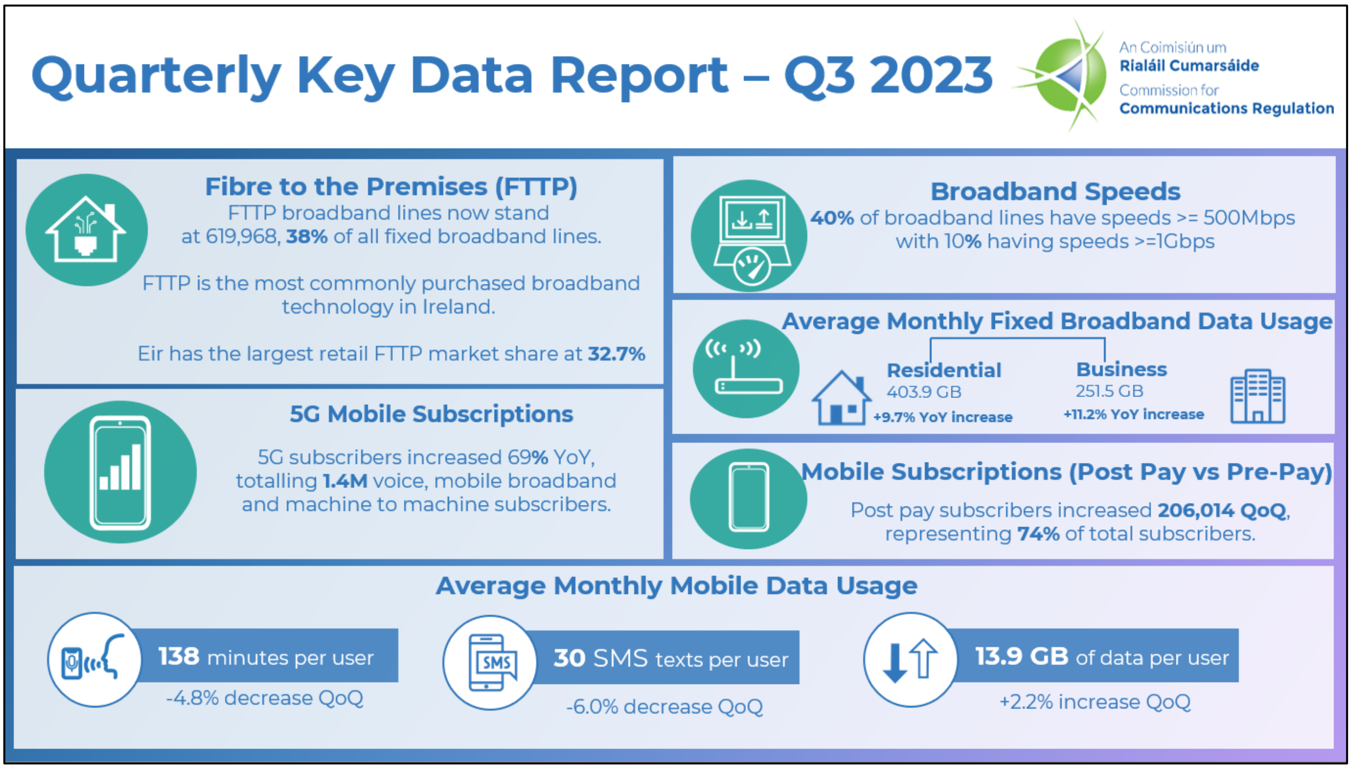
  - Figure 7 – Retail Market Shares by Subscription excluding Mobile Broadband (MBB) and Machine to Machine (M2M)
- Corrigendum
- Appendix

2 Q3 2023 Infographic



3 Overview of Irish Communications Market Q3 2023

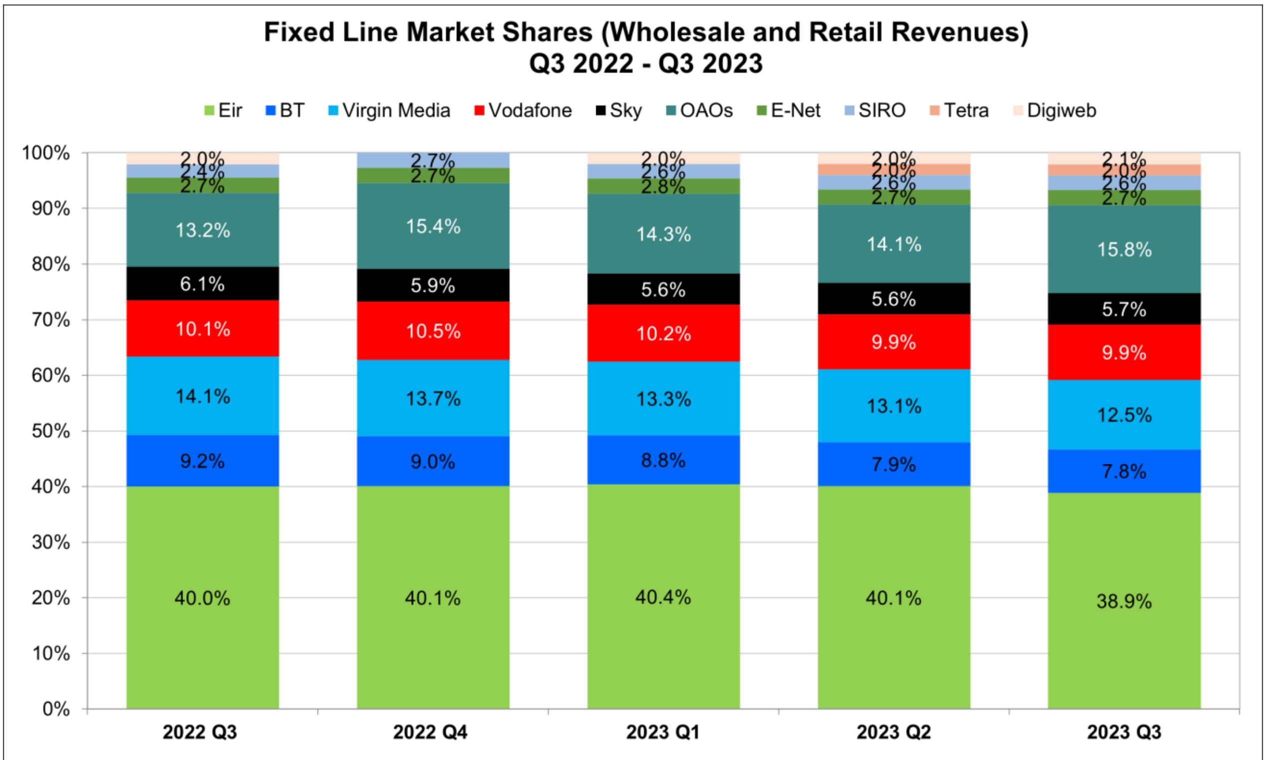
Table 1 - Communications Summary

Revenues	2023 Q2	2023 Q3	QoQ	YoY
Total Retail Market Revenues (000s)	€910,691	€917,060	0.7%	3.4%
Total Fixed Line Retail Revenues (000's)	€352,434	€355,843	1.0%	11.6%
Total Mobile Retail Revenues (000's)	€424,420	€428,843	1.0%	2.4%
Broadcasting Retail Revenues (000s)	€133,837	€132,374	-1.1%	-11.2%
Total Fixed Line Wholesale Revenues (000's)	€149,422	€156,228	4.6%	8.8%
Total Mobile Wholesale revenues (000's)	€35,547	€37,108	4.4%	-0.9%
Voice Traffic	**2023 Q2**	**2023 Q3**	**QoQ**	**YoY**
Total Voice Traffic Minutes (000s)	2,790,773	2,687,178	-3.7%	-24.8%
Total Fixed Voice Minutes (000's)	320,908	304,842	-5.0%	-24.0%
Total Mobile Voice Minutes (000's)	2,469,865	2,382,336	-3.5%	-24.9%
Subscriber Lines	**2023 Q2**	**2023 Q3**	**QoQ**	**YoY**
Total Fixed Broadband Subscriber Lines	1,621,377	1,646,710	1.6%	2.8%
Total Fixed Subscriber lines	2,381,407	2,387,485	0.3%	10.8%
Total Fixed Voice (PSTN, ISDN and VOIP) Subscriber lines	1,227,892	1,202,282	-2.1%	-2.9%
Mobile Subscriptions inc. MBB and M2M - Total	9,292,295	9,532,361	2.6%	10.6%
Machine to Machine (M2M) Subscriptions	3,249,528	3,411,242	5.0%	28.4%
Mobile Broadband Subscriptions (HSDPA and LTE)	382,797	383,896	0.3%	1.4%
Mobile Subscriptions exc. MBB and M2M - Total	5,659,970	5,737,223	1.4%	2.8%
Data Traffic Volumes	**2023 Q2**	**2023 Q3**	**QoQ**	**YoY**
Total Fixed Broadband Data Traffic (GB)	1,808,929,288	1,925,314,567	6.4%	13.1%
Mobile Broadband (Dongles) Data Traffic (GB)	83,984,975	90,769,416	8.1%	3.6%
Standard Mobile Subscriber Lines Data Traffic (GB)	231,009,890	237,919,368	3.0%	12.5%
Total Mobile Data Traffic (GB)	366,601,759	389,116,000	6.1%	20.2%

Fixed Market

- In Q3 2023, Eir had the highest revenue share (retail and wholesale) in the fixed market at 38.9%.
- ComReg estimates that the next eight largest operators (Virgin Media Ireland, Vodafone (fixed only), BT Ireland, Sky Ireland, E-Net, SIRO, Tetra and Digiweb) contribute a further 45.3 % share of total industry revenue.
- Other Authorised Operators (OAOs) account for the remaining 15.8 % share.

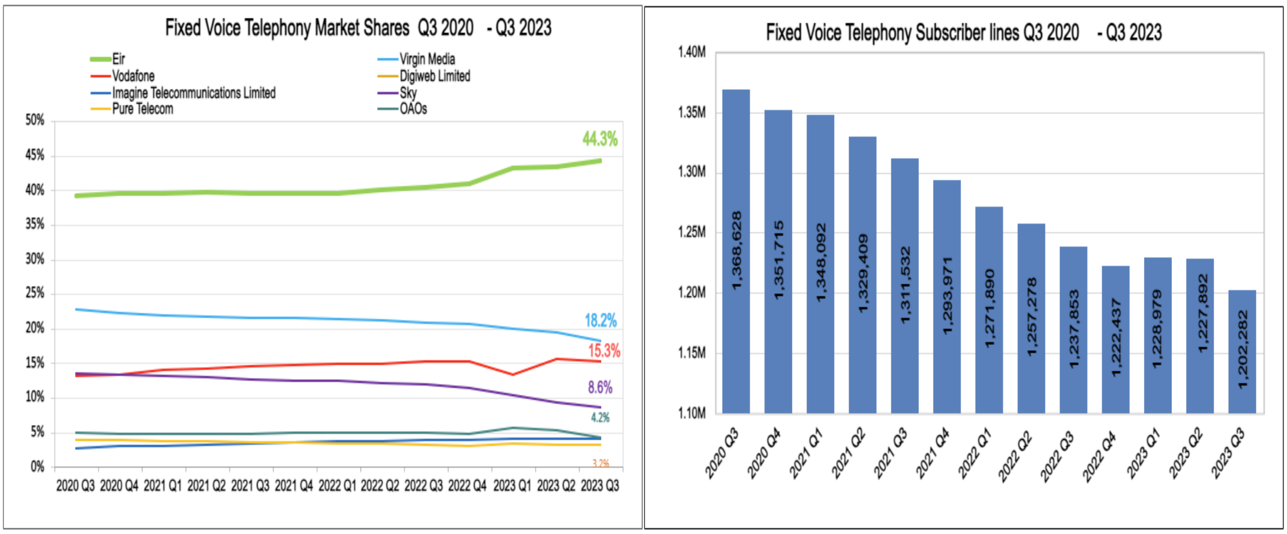
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Source: Quarterly Key Data Questionnaire

4 Retail Fixed Voice Market

Figure 2 – Retail Fixed Voice Subscriber lines



- Fixed voice traffic in Q3 2023 was almost 305 million minutes, which was an 5% decrease on Q2 2023 and a decrease of 24% since Q3 2022.
- At the end of Q3 2023 there were 1,202,282 fixed voice subscriber lines (a decrease of 2% since Q2 2023 and a decrease of 3% on Q3 2022).

- As of Q3 2023 Eir had 44.3% of all fixed voice subscriber lines followed by Virgin Media (18.2%), Vodafone (15.3%), Sky (8.6%), Imagine Telecommunications Limited (4.1%), Pure Telecom (3.2%) and Digiweb (2.1%). OAOs accounted for the remaining 4.2% of fixed voice subscriber lines.

5 Retail Broadband Market

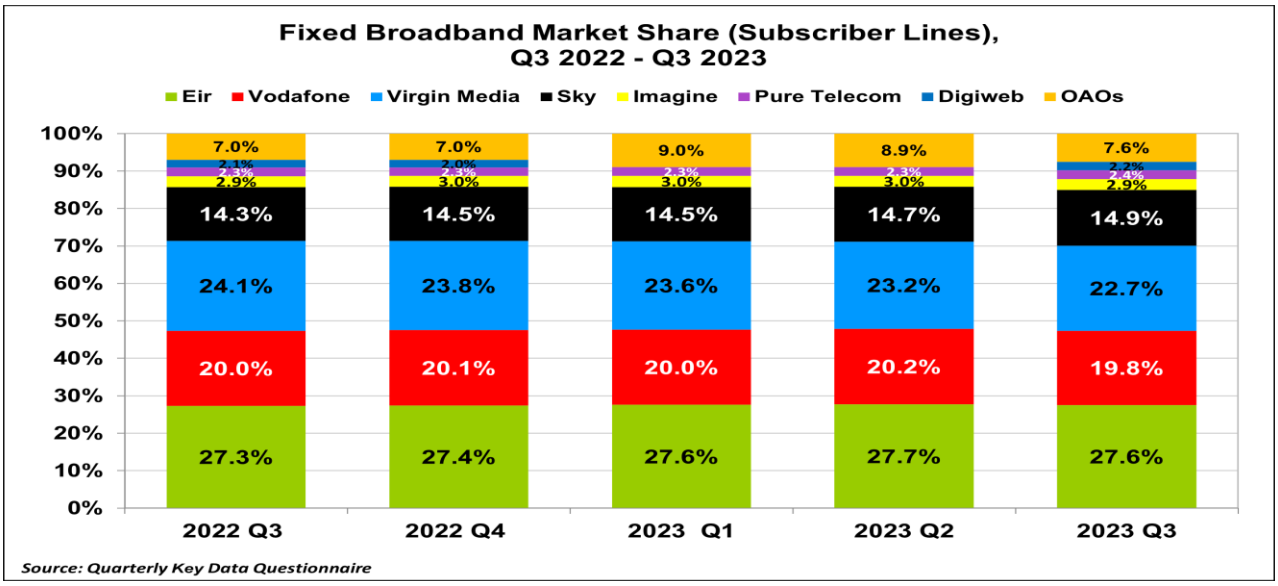
At the end of September 2023, there were over 2 million active broadband subscriber lines in Ireland. This is a 1.32% increase from the previous quarter and a 2.53% increase on Q3 2022.

Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q3 2023	Quarterly Change Q2'23 – Q3'23	Annual Change Q3'22 – Q3'23
Cable Broadband	354,074	-1.56%	-4.44%
DSL Broadband	93,718	-6.92%	-24.9%
VDSL Broadband	478,362	-3.07%	-13.92%
FTTP Broadband	619,968	7.62%	33.83%
Satellite Broadband	6,678	26.12%	89.02%
FWA Broadband	93,910	8.98%	11.65%
Total Fixed Broadband	1,646,710	1.56%	2.80%
Mobile Broadband	383,896	0.29%	1.4%
Total Broadband	**2,030,606**	**1.32%**	**2.53%**

FTTP (+7.62%), FWA (+8.98%) and Satellite (+26.12%) showed positive growth this quarter. VDSL (-3.07%), DSL (-6.92%) and Cable (-1.56%) subscriber lines fell this quarter. The increase in FWA lines is due to additional operators reporting to ComReg this quarter.

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



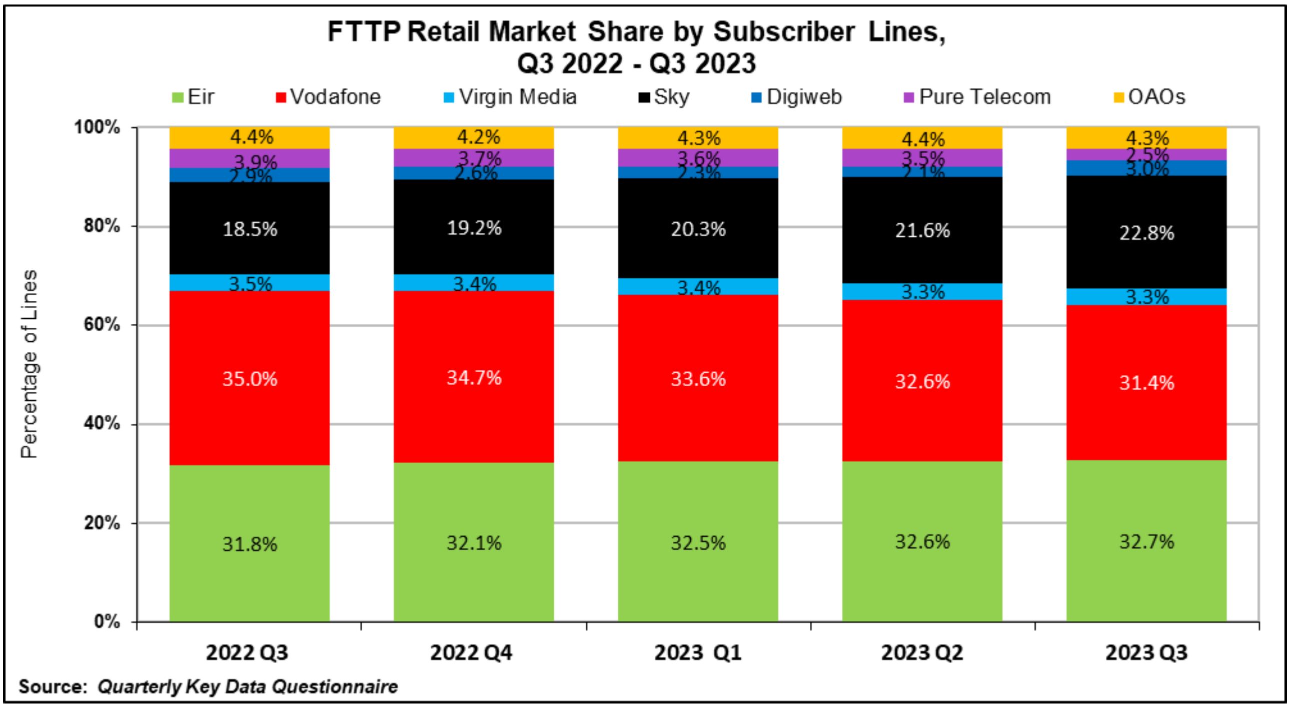
- In Q3 2023, Eir had 27.6% of total retail fixed broadband subscriber lines, followed by Virgin Media who had 22.7% of lines. Vodafone had 19.8% (excluding mobile broadband), Sky Ireland 14.9%, Imagine 2.9%, Pure Telecom 2.4% and Digiweb 2.2%.
- All other OAOs combined accounted for the remaining 7.6% 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	Q2 2023	Q3 2023	Quarterly Change
<2Mbps - 9.99Mbps	3.8%	3.5%	-0.3%
=10Mbps - 29.99Mbps	5.5%	5.3%	-0.2%
=30Mbps - 99.99Mbps	29.7%	28.5%	-1.2%
=100Mbps - 499.99Mbps	24.1%	22.9%	-1.2%
=500Mbps - 999.99Mbps	27.5%	29.5%	+2.0%
>=1GB	9.5%	10.2%	+0.7%

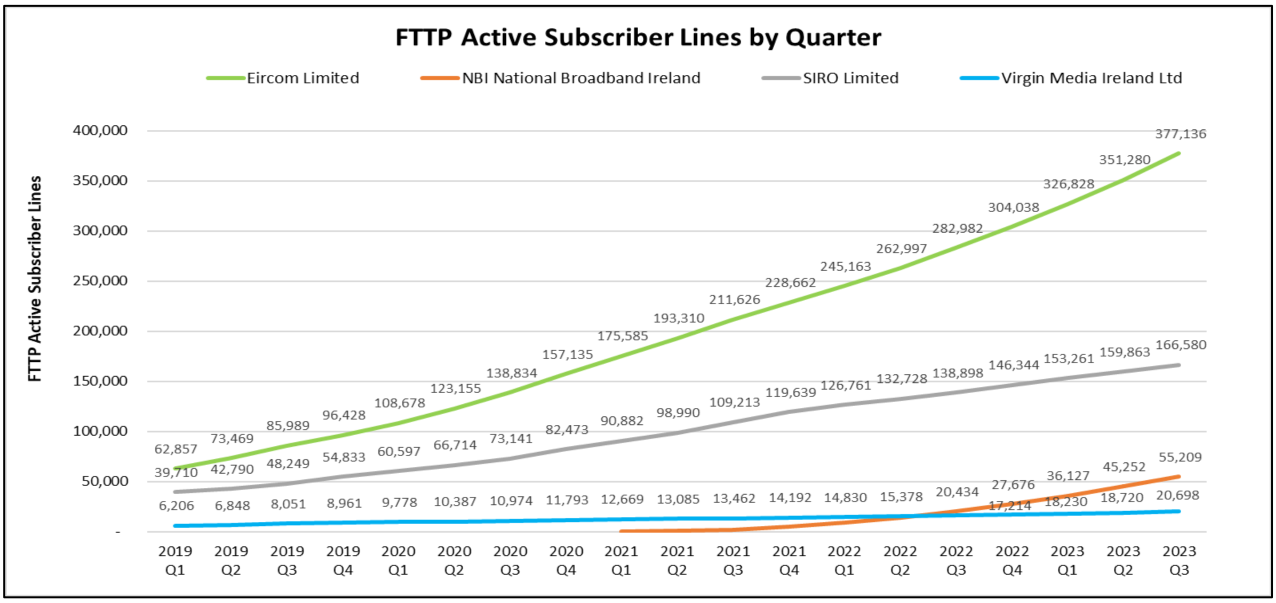
- In Q3 2023 63% of all fixed broadband subscriber lines had sold speeds which were equal to or greater than 100Mbps, with 40% having sold speeds equal to or greater than 500Mbps.

Figure 4 - FTTP Subscriber Line Market Share



- In Q3 2023, Eircom had 32.7% of retail FTTP subscriber lines, followed by Vodafone with 31.4%, Sky Ireland at 22.8%, Virgin Media at 3.3%, Digiweb at 3% and Pure Telecom at 2.5%. OAOs accounted for the remaining 4.3%.

Figure 5 – FTTP Active Subscriber Lines by Quarter

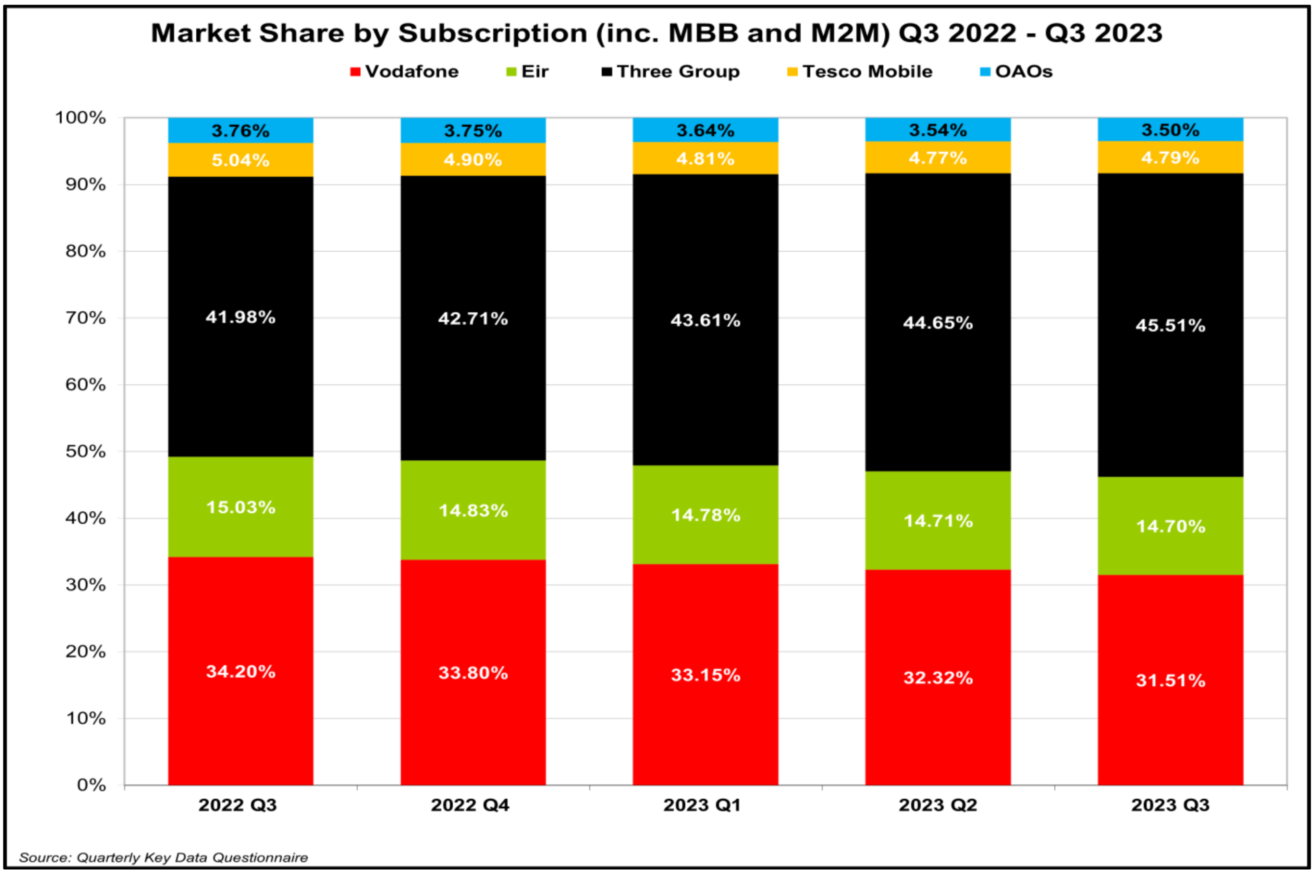


- In Q3 2023 Eircom had 377k active FTTP subscriber lines, followed by Siro with 167k, NBI with 55k and Virgin Media Ireland with 20.7k.

6 Mobile Market

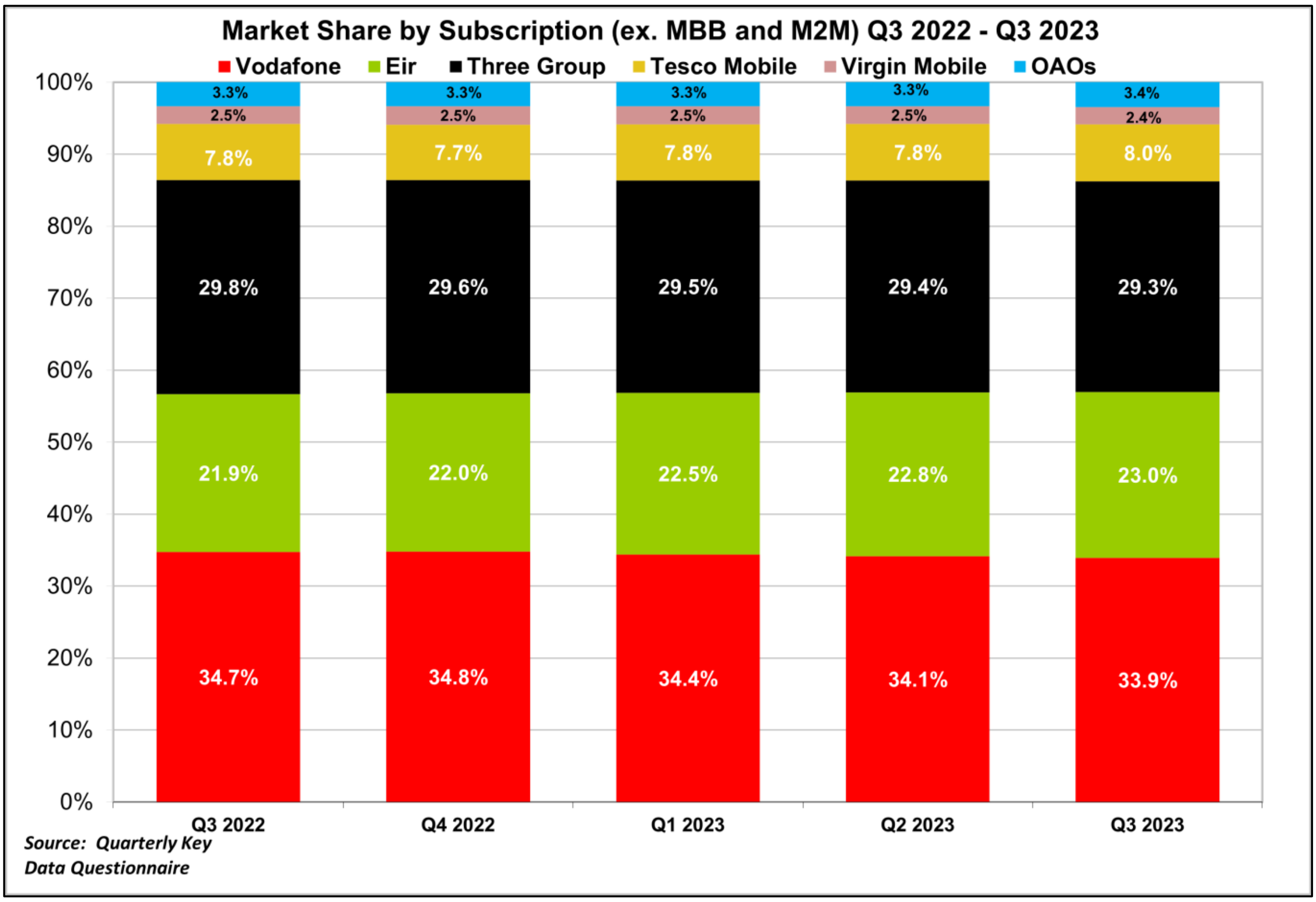
At the end of Q3 2023 there were 9,532,361 mobile subscriptions in Ireland, including mobile broadband ('MBB') and Machine to Machine ('M2M'). If mobile broadband subscriptions (383,896) and M2M subscriptions (3,411,242) are excluded, the total number of mobile voice subscriptions was 5,737,223.

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



- In Q3 2023 Three had the largest share of mobile subscriptions including MBB and M2M at 45.5%. This was followed by Vodafone with 31.5%, Eir with 14.7%, Tesco Mobile at 4.8% and OAOs at 3.5%.
- In Q3 2023 Vodafone had the highest market share excluding mobile broadband and M2M (33.9%), followed by Three (29.3%), Eir (23%), Tesco Mobile (8.0%), Virgin Mobile (2.4%) and OAOs (3.4%).
- There were 2,035,330 2G, 908,443 3G, 5,184,553 4G and 1,404,035 5G mobile subscriptions in Q3 2023.

Figure 7 - Market Shares by Subscription excluding Mobile Broadband and Machine to Machine



7 Corrigenda and Notes to Q1 2023 – Q3 2023

Note 1: Wholesale Revenue has been revised by NBI for Q1 and Q2 2023.

Note 2: VOIP and WLR lines have been revised by Vodafone for Q1 and Q2 2023.

Note 3: Eurona and Blueface have revised call origination minutes for Q2 2023.

Note 4: Digiweb Revenues were revised due to system issues for Q1 and Q2 2023.

Note 5: NBI Revision of FTTH figures from methodology change.

Note 6: The pricing data has been excluded this quarter as the figures are under review due to a change in methodology.

Note 7: Actual call minutes have been used for Q3 2023, with the exception of one operator that is working to improve data collection.

Note 8: Pure Telecom's VDSL and FTTH numbers are estimated for Q3 2023.

Note 9: Virgin's cable and FTTP broadband numbers are estimated for Q3 2023.

Note 10: ComReg has published a revision to the Q3 2023 QKDR document 23/114 on 13th December 2023 (23/114R). Due to a calculation error, market shares for broadband and FTTP (Part 5) were updated. Operator market shares increased by between 0% and 0.33% (Broadband) and 0% and 0.1% (FTTP), while OAO market share reduced by 1.09% (Broadband) and 0.21% (FTTP).

8 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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