



An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

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Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q4 2021

QKDR DATA PORTAL

Access the latest statistical information on Electronic
Communication Services

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

Reference: ComReg 22/19

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Q4 2021 Key Quarterly Trends

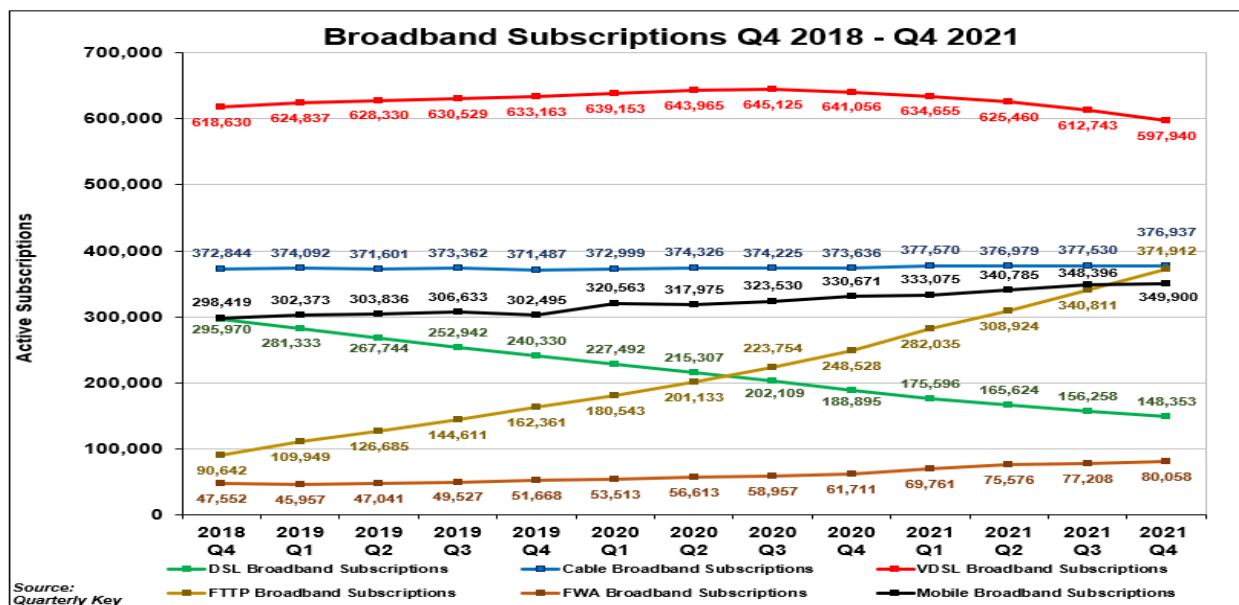
372k (+9%) Total FTTP broadband subscriptions

80k (+4%) Total FWA broadband subscriptions

9% Increase in M2M subscriptions

392k 5G Mobile subscriptions (Voice & MBB)

6% Increase in Mobile retail revenues



Total Fixed
Broadband Data
Traffic increased 7%
QoQ

5G mobile subscriptions
increased 32% QoQ
&
5G mobile traffic
increased 143% QoQ

50% of broadband
subscriptions have
a speed of
≥100Mbps

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 October 2021 to 31st December 2021. 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
 - Figure 1 – Fixed Line Market Shares based on Wholesale and Retail Revenue
- Fixed Voice
 - Figure 2 – Retail Fixed Voice Subscriptions
- Broadband Market
 - Table 2 – Total Number of Active Broadband Subscriptions
 - Figure 3 – Retail Fixed Broadband Market Shares based on Subscriptions
 - Table 3 – Retail Fixed Broadband Subscriptions by Sold Download Speed
 - Figure 4 – Retail FTTP Subscription Market Shares
- Mobile Market
 - Figure 5 – Retail Market Shares by Subscription including Mobile Broadband (MBB) and Machine to Machine (M2M)
 - Figure 6 – Retail Market Shares by Subscription excluding Mobile Broadband (MBB) and Machine to Machine (M2M)
- Corrigendum
- Memorandum

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Overview of Irish Communications Market Q4 2021

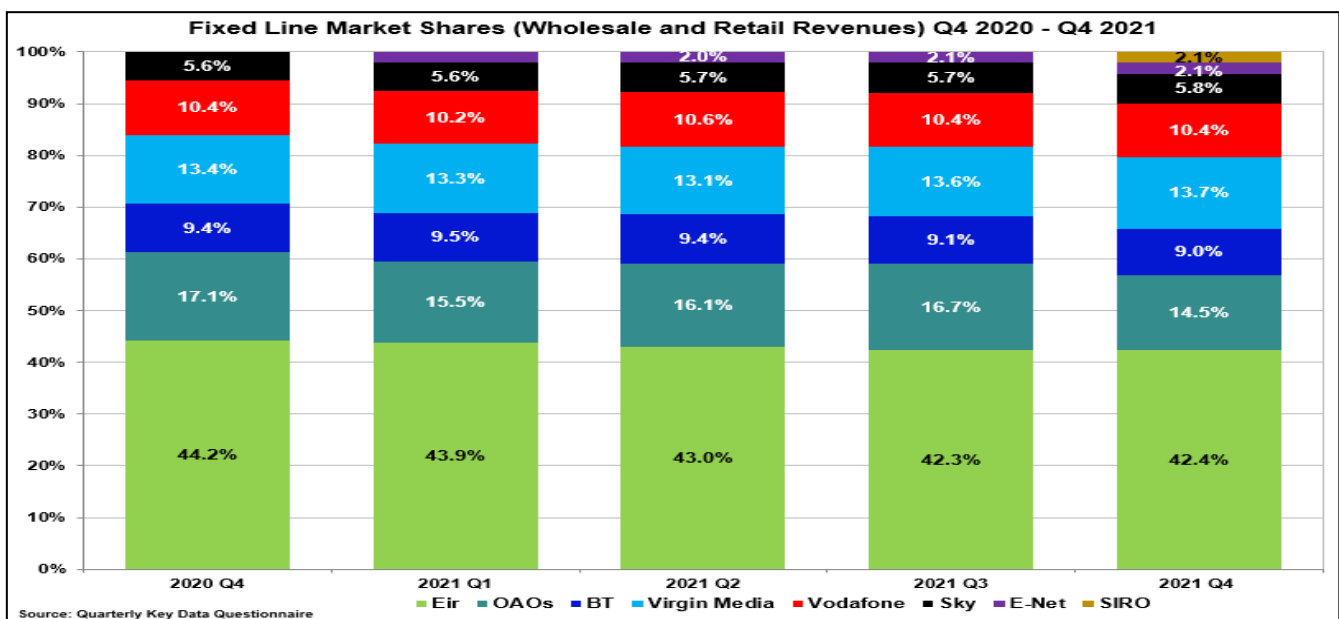
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q4 2021				
	Q3 2021	Q4 2021	Quarterly Change	Annual Change
Total Retail Market Revenues	€865,785,295	€891,997,892	3.0%	0.6%
Fixed Line Retail Revenues	€326,158,957	€327,850,478	0.5%	-3.4%
Mobile Retail Revenues	€391,826,716	€414,173,414	5.70%	2.57%
Broadcasting Retail Revenues	€147,800,809	€149,974,000	1.5%	4.8%
Fixed Line Wholesale Revenues	€137,991,590	€141,234,478	2.4%	8.9%
Mobile Wholesale Revenues	€38,911,000	€37,470,000	-3.7%	0.6%
Total Voice Traffic (Minutes)	3,930,684,853	3,938,899,119	0.2%	-4.9%
Fixed Voice Traffic (Minutes)	513,959,000	508,209,225	-1.1%	-22.2%
Mobile Voice Traffic (Minutes)	3,416,725,853	3,430,689,894	0.4%	-1.7%
Fixed Broadband Subscriptions	1,566,462	1,576,973	0.7%	4.0%
Fixed Subscriptions	2,200,749	2,190,028	-0.5%	-1.0%
Fixed Voice Subscriptions	1,311,532	1,293,971	-1.3%	-4.3%
Total Mobile Subscriptions	7,638,611	7,899,776	3.4%	10.6%
Machine to Machine Subscriptions	1,990,167	2,176,011	9.3%	38.2%
Mobile Broadband Subscriptions	348,396	349,900	0.4%	5.8%
Mobile Voice Subscriptions	5,300,048	5,373,865	1.4%	2.7%
Total Fixed Broadband Data Traffic (GB)	1,463,788,752	1,571,145,334	7.3%	1.8%
Mobile Broadband (Dongles) Data Traffic (GB)	76,244,510	86,608,256	13.6%	31.1%
Standard Mobile Subscriptions Data Traffic (GB)	184,030,332	192,083,331	4.4%	37.8%
Total Mobile Data Volumes (GB)	267,579	285,041	6.5%	36.6%

Fixed Market

- In Q4 2021, Eir had the highest revenue share in the fixed market with a 42.4% market share. ComReg estimates that the next six largest operators (BT Ireland, Sky Ireland, Virgin Media Ireland, Vodafone (fixed only), E-Net & SIRO) contribute a further 43.1% share of total (retail and wholesale) industry revenue, while Other Authorised Operators (OAOs) account for the remaining 14.5% share.

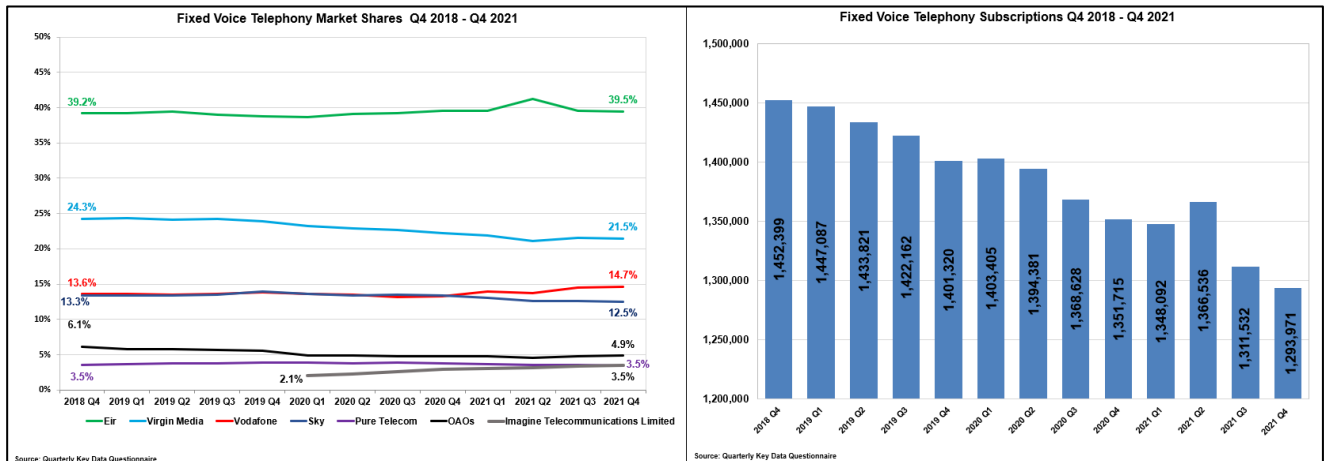
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Fixed voice traffic in Q4 2021 was over 508 million minutes, which was a 1.1% decrease on Q3 2021 and a decrease of 22.2% since Q4 2020. Managed voice over broadband (VoB) minutes account for approximately 29.8% of total fixed voice minutes, up from 23.6% in Q4 2020.

Figure 2 – Retail Fixed Voice Subscriptions



- At the end of Q4 2021 there were 1,293,971 fixed voice subscriptions (a decrease of 1.34% since Q3 2021 and a decrease of 4.27% on Q4 2020).
- As of Q4 2021 Eir had 39.5% of all fixed voice subscriptions followed by Virgin Media (21.5%), Vodafone (14.7%), Sky (12.5%), Pure Telecom (3.5%) & Imagine Telecommunications Limited (3.5%). OAOs accounted for the remaining 4.9% of fixed voice subscriptions.

Retail Broadband Market

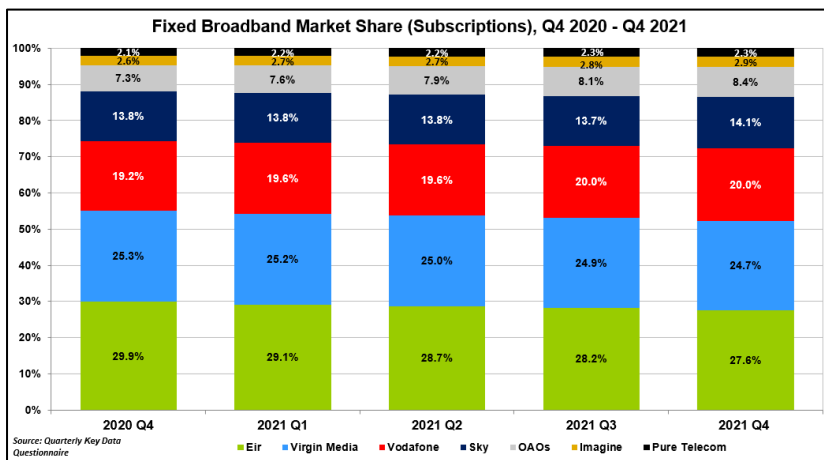
At the end of December 2021, there were 1.93 million active broadband subscriptions in Ireland. This was an increase of 0.6% on the previous quarter and a 4.3% increase on Q4 2020.

Table 2 - Total Number of Active Broadband Subscriptions

Subscription Type	Q4 2021	Quarterly Growth Q3'21 – Q4'21	Annual Growth Q4'20 – Q4'21
Cable Broadband	376,937	-0.16%	0.88%
DSL Broadband	148,353	-5.06%	-21.46%
VDSL Broadband	597,940	-2.42%	-6.73%
FTTP Broadband	371,912	9.13%	49.65%
Satellite Broadband	1,773	-7.27%	-33.27%
FWA Broadband	80,058	3.69%	29.73%
Total Fixed Broadband	1,576,973	0.67%	3.99%
Mobile Broadband	349,900	0.43%	5.82%
Total Broadband	1,926,873	0.63%	4.32%

- Subscriptions for FTTP (+9.13%), FWA (+3.69%) & Mobile Broadband (+0.43%) showed positive growth this quarter. VDSL (-2.42%), DSL (-5.06%), Cable (-0.16%) and Satellite (-7.27%) subscriptions all fell this quarter.

Figure 3 – Retail Fixed Broadband Market Shares based on Subscriptions



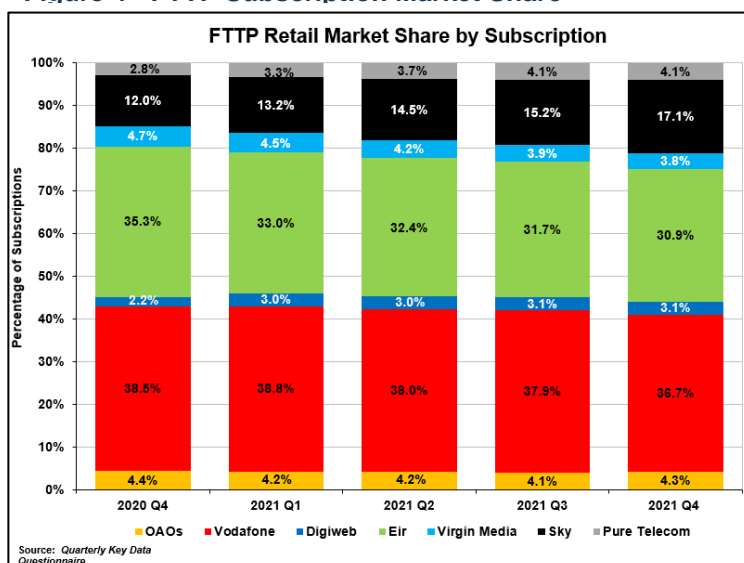
- In Q4 2021, Eir had 27.6% of total retail fixed broadband subscriptions, followed by Virgin Media who had 24.7% of subscriptions. Vodafone had 20.0% (excluding mobile broadband subscriptions), Sky Ireland 14.1% and Imagine and Pure Telecom had 2.9% and 2.3% market share respectively.
- All other OAOs combined accounted for the remaining 8.4% share of retail fixed broadband subscriptions.

Table 3 - Retail Fixed Broadband Subscriptions by Sold Download Speed

Fixed Broadband Subscriptions by Sold Speed	Q4 2021	Q3 2021	Quarterly Change
<2Mbps	0.6%	0.7%	-0.06%
2Mbps – 9.99Mbps	5.1%	5.4%	-0.32%
=10Mbps – 29.99bps	7.5%	7.7%	-0.29%
=30Mbps – 99.99Mbps	36.7%	37.9%	-1.18%
=100Mbps – 499.99Mbps	30.2%	30.6%	-0.32%
>= 500Mbps	19.9%	17.8%	+2.16%

- 86.8% of all fixed broadband subscriptions were equal to or greater than 30Mbps in Q4 2021.

Figure 4 - FTTP Subscription Market Share

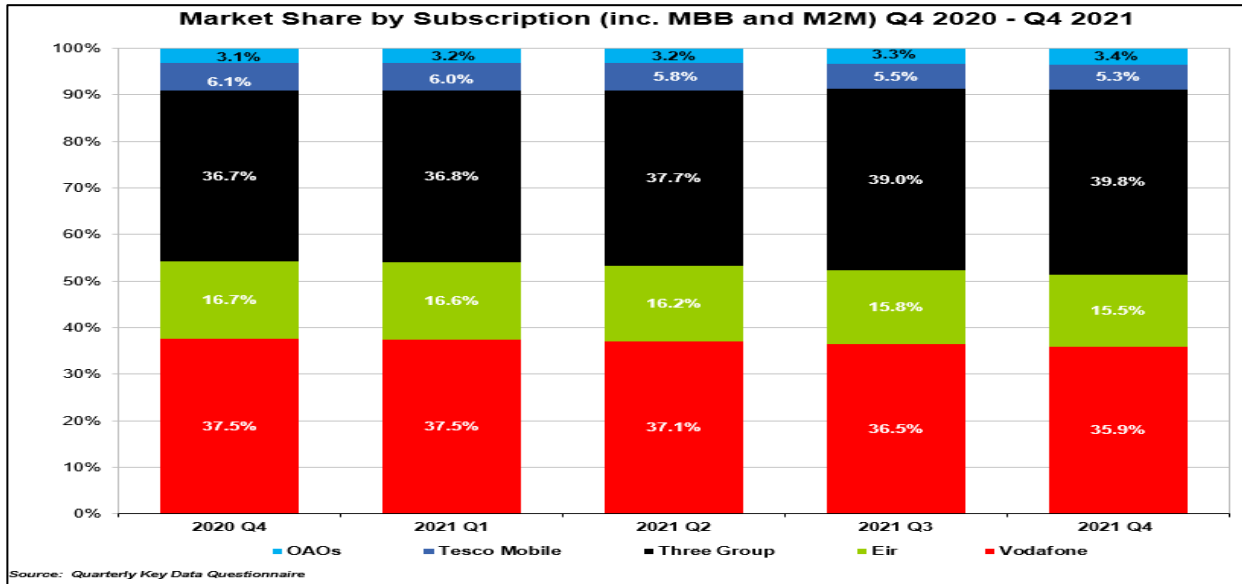


- In Q4 2021, Vodafone had 36.7% of retail FTTP subscriptions, followed by Eir at 30.9%, Sky Ireland at 17.1%, Pure Telecom at 4.1%, Virgin Media at 3.8%, and Digiweb at 3.1% market share.
- OAOs combined accounted for the remaining 4.3% market share.

Mobile Market

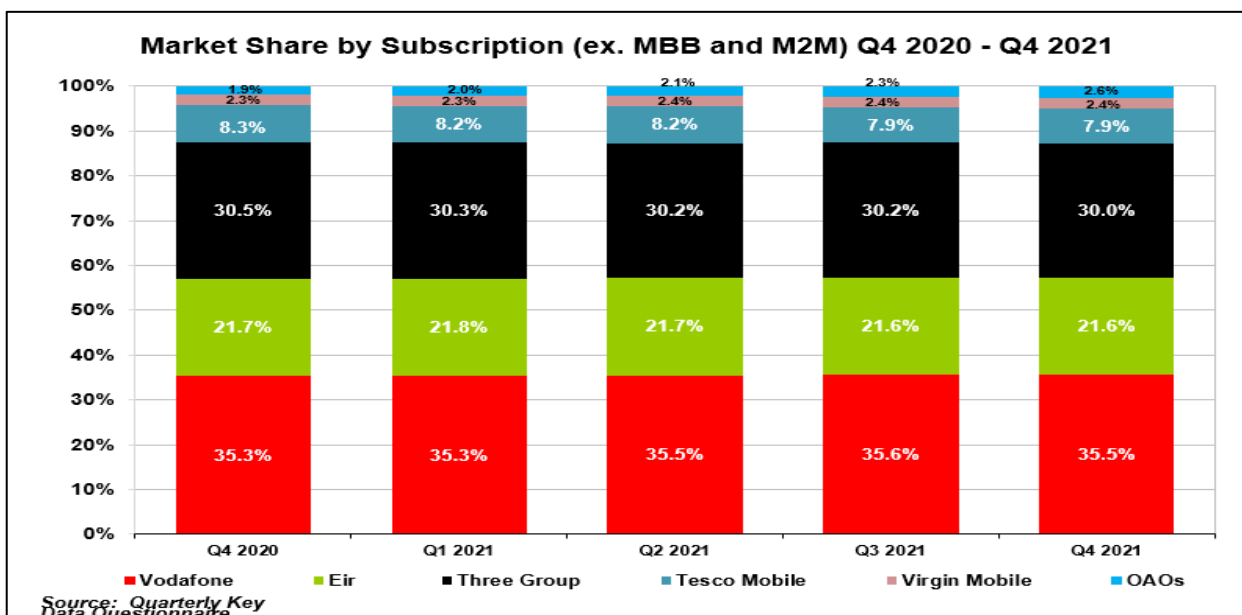
At the end of Q4 2021 there were 7,899,776 mobile subscriptions in Ireland, including mobile broadband ('MBB') and Machine to Machine ('M2M'). If mobile broadband subscriptions (349,900) and M2M subscriptions (2,176,011) are excluded, the total number of mobile subscriptions was 5,373,865.

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



- In Q4 2021 Three had the largest share of mobile subscriptions including MBB and M2M at (39.8%). This was followed by Vodafone with (35.9%), Eir with (15.5%), Tesco Mobile at (5.3%) and OAOs at (3.4%).
- In Q4 2021 Vodafone had the highest market share excluding mobile broadband and M2M (35.5%), followed by Three Group (30.0%), Eir (21.6%), Tesco Mobile (7.9%), Virgin Mobile (2.4%) and OAOs (2.6%).
- In Q4 2021 there were 1,100,580 2G, 1,380,495 3G, 5,026,619 4G and 392,082 5G mobile voice & MBB subscriptions.

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



Corrigendum to Q2 2020 – Q3 2021 QKDR

Note 1: Total Mobile Retail Revenues were revised for Q2 2020 – Q3 2021, Monthly Post-paid ARPU were revised for Q2 2021 – Q3 2021, Retail Minutes were revised for Q1 2021 – Q3 2021 & Retail/Wholesale revenues were revised for Q4 2020 – Q3 2021 following revisions from Tesco Mobile.

Note 2: Satellite Broadband Data Traffic (GB) & Total Fixed Broadband Data Traffic (GB) were revised for Q1 2021 – Q3 2021 following revisions from Onwave Limited.

Note 3: Total Mobile Data Traffic & Total Mobile Retail Revenues were revised for Q3 2021 following revisions from Vodafone Ireland.

Note 4: Mobile subscriptions were revised for Q3 2021 following revisions from Eircom.

Note 5: Retail & Wholesale revenues were revised for Q3 2021 following revisions from BT.

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 & 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) .