An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Date: 11/03/2021

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q4 2020

QKDR DATA PORTAL

Access the latest statistical information on Electronic Communication Services

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

Reference: **ComReg 21/20**

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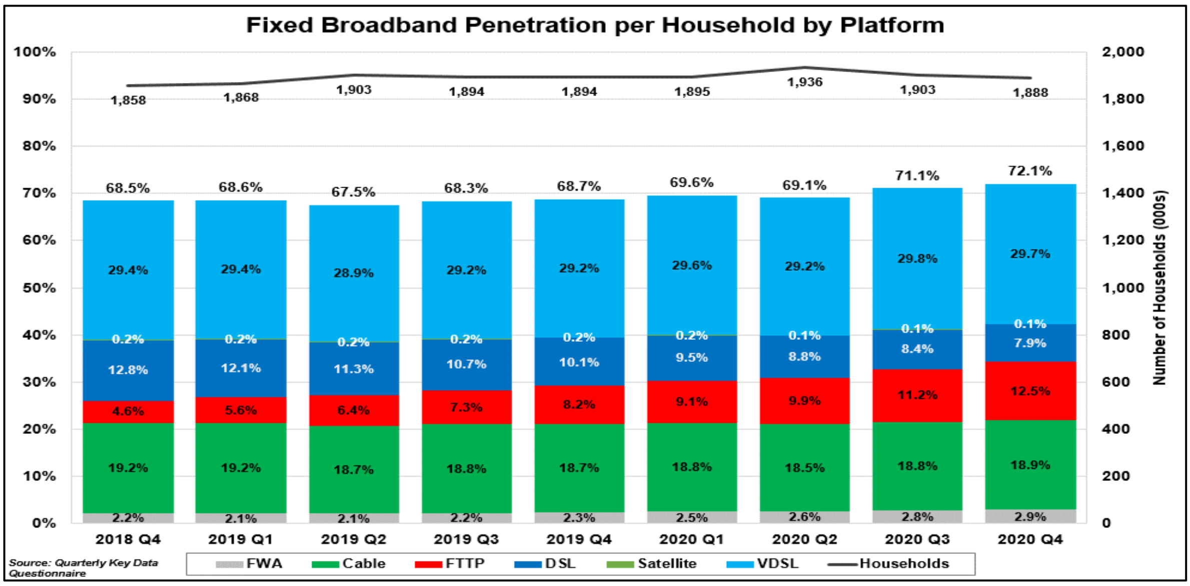
Q4 2020 Key Quarterly Trends

15% QoQ increase in Fixed Broadband Traffic

8% QoQ increase in Machine to Machine Subscriptions

249k Total FTTP Broadband Subscriptions



FTTP Broadband traffic increased by 24.1% QoQ

FWA Broadband traffic increased by 17.4% QoQ

Fixed Broadband residential traffic increased by 14.9% QoQ

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 2020 to 31st December 2020. The report is based on submissions from 46 active operators.

The report contains the following key charts/data

- Overview of Markets
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  - Fixed Voice
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    - Table 3 – Retail Fixed Broadband Subscriptions by Sold Download Speed
    - Figure 4 – Retail FTTP Subscription Market Shares
- Mobile Market
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Overview of Irish Communications Market Q4 2020

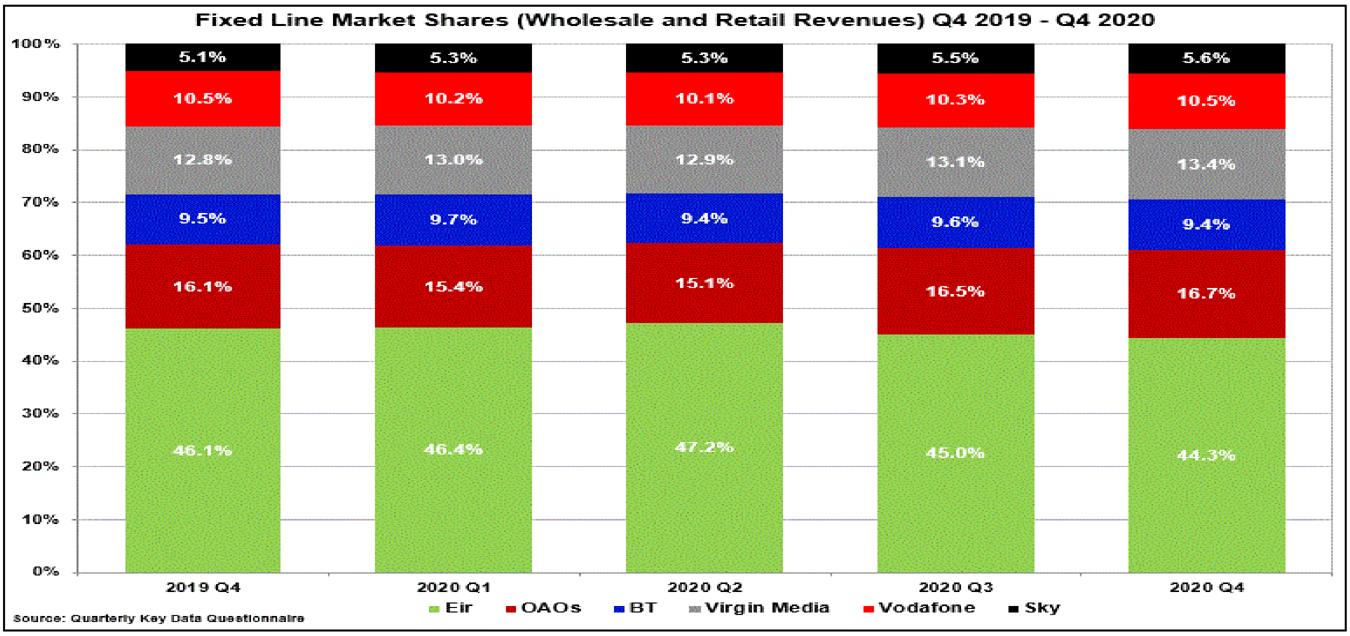
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q4 2020				
	Q4 2020	Q3 2020	Quarterly Change	Annual Change
Total Retail Market Revenues	€885,492,641	€880,271,718	0.6%	-2.4%
Fixed Line Retail Revenues	€337,625,779	€336,917,251	0.2%	-0.5%
Mobile Retail Revenues	€404,750,930	€398,002,000	1.7%	-2.7%
Broadcasting Retail Revenues	€143,115,932	€145,352,467	-1.5%	-5.4%
Fixed Line Wholesale Revenues	€129,431,810	€128,702,547	0.6%	-0.6%
Mobile Wholesale Revenues	€37,233,565	€38,084,000	-2.2%	-13.9%
Total Voice Traffic (Minutes)	4,143,114,737	4,085,630,801	1.4%	13.4%
Fixed Voice Traffic (Minutes)	653,361,114	638,552,231	2.3%	9.9%
Mobile Voice Traffic (Minutes)	3,489,753,623	3,447,078,570	1.2%	14.1%
Fixed Broadband Subscriptions	1,516,252	1,506,832	0.6%	3.7%
Fixed Subscriptions	2,211,940	2,213,319	-0.1%	-0.3%
Fixed Voice Subscriptions	1,327,000	1,346,511	-1.4%	-5.3%
Total Mobile Subscriptions	7,139,486	6,964,436	2.5%	7.0%
Machine to Machine Subscriptions	1,574,788	1,458,224	8.0%	30.5%
Mobile Broadband Subscriptions	330,671	323,530	2.2%	9.3%
Mobile Voice Subscriptions	5,234,027	5,182,682	1.0%	1.4%
Total Fixed Broadband Data Traffic (GB)	1,543,258,188	1,347,209,731	14.6%	68.6%
Mobile Broadband (Dongles) Data Traffic (GB)	56,981,681	50,681,152	12.4%	81.9%
Standard Mobile Subscriptions Data Traffic (GB)	140,799,757	157,671,085	-10.7%	25.3%
Total Mobile Data Volumes (GB)	208,736,097	211,573,352	-1.3%	38.8%

Fixed Market

- In Q4 2020, Eir had the highest revenue share in the fixed market with a 44.3% 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 16.7% share.

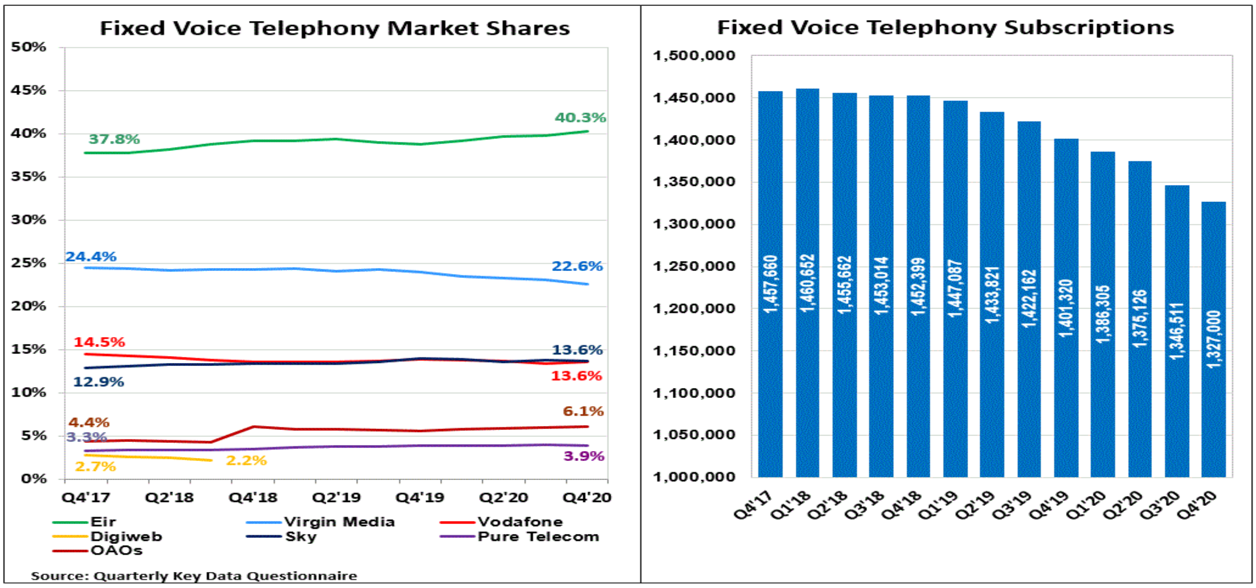
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Fixed voice traffic in Q4 2020 was over 653 million minutes, which was a 2.3% increase on Q3 2020 and an increase of 9.9% since Q4 2019. Managed voice over broadband (VoB) minutes account for approximately 23.6% of total fixed voice minutes, up from 20.6% in Q4 2019.

Figure 2 – Retail Fixed Voice Subscriptions



- At the end of Q4 2020 there were 1,327,000 fixed voice subscriptions (a decrease of 1.4% since Q3 2020 and a decrease of 5.3% on Q4 2019).
- As of Q4 2020 Eir had 40.3% of all fixed voice subscriptions followed by Virgin Media (22.6%), Vodafone (13.6%), Sky (13.6%) and Pure Telecom (3.9%). OAOs accounted for the remaining 6.1% of fixed voice subscriptions.

Retail Broadband Market

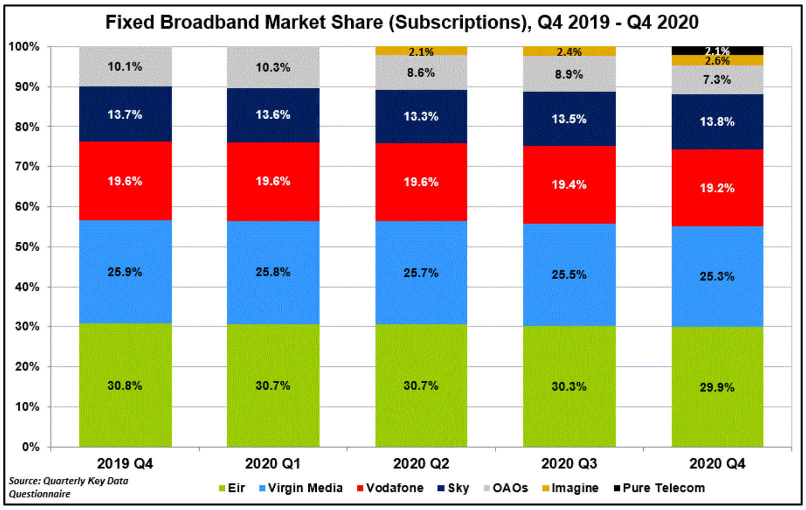
At the end of December 2020, there were 1.847 million active broadband subscriptions in Ireland. This was an increase of 0.9% on the previous quarter and a 4.6% increase on Q4 2019.

Table 2 - Total Number of Active Broadband Subscriptions

Subscription Type	Q4 2020	Quarterly Growth Q3'20 – Q4'20	Annual Growth Q4'19 – Q4'20
DSL Broadband	188,895	-6.5%	-21.4%
VDSL Broadband	641,056	-0.6%	1.2%
Cable Broadband	373,636	-0.2%	0.6%
FTTP Broadband	248,528	11.1%	53.1%
Satellite Broadband	2,657	-8.6%	-24.9%
FWA Broadband	61,480	4.7%	19.0%
Total Fixed Broadband	1,516,252	0.6%	3.7%
Mobile Broadband	330,671	2.2%	9.3%
Total Broadband	**1,846,923**	**0.9%**	**4.6%**

- Subscriptions for FTTP (+11.1%), FWA (+4.7%) and Mobile Broadband (+2.2%) showed positive growth this quarter. VDSL (-0.6%), DSL (-6.5%), Cable (-0.2%) and Satellite (-8.6%) subscriptions all fell this quarter.

Figure 3 – Retail Fixed Broadband Market Shares based on Subscriptions



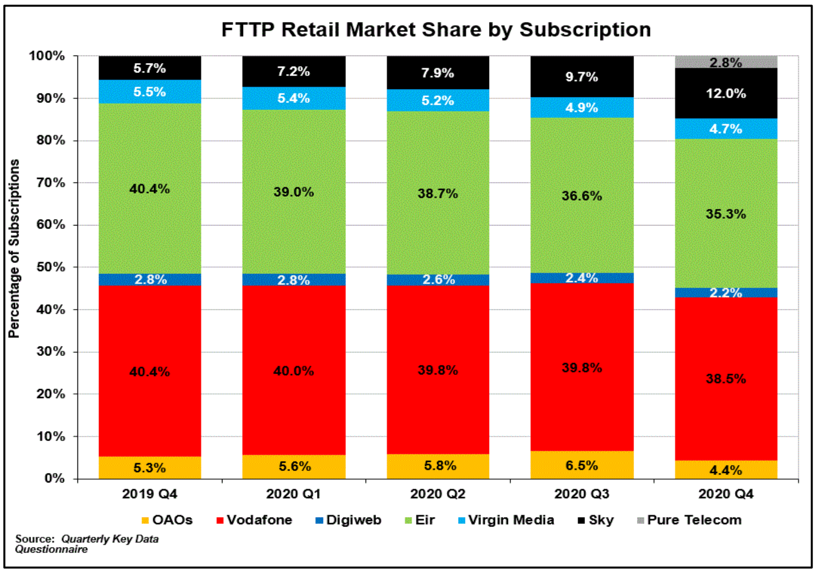
- In Q4 2020, Eir had 29.9% of total retail fixed broadband subscriptions, followed by Virgin Media who had 25.3% of subscriptions. Vodafone had 19.2% (excluding mobile broadband subscriptions), while Sky Ireland, and Imagine had a 13.8% and 2.6% market share respectively.
- Pure Telecom has surpassed the 2% market share threshold in Q4 2020 with a 2.1 % market share.
- All other OAOs combined accounted for the remaining 7.3% share of retail fixed broadband subscriptions.

Table 3 - Retail Fixed Broadband Subscriptions by Sold Download Speed

Fixed Broadband Subscriptions by Sold Speed	Q4 2020	Q3 2020	Quarterly Change
<2Mbps	0.6%	0.7%	-0.1%
2Mbps – 9.99Mbps	7.1%	7.7%	-0.6%
=10Mbps – 29.99bps	10.7%	11.3%	-0.6%
=30Mbps – 99.99Mbps	39.1%	39.6%	-0.5%
>=100Mbps	42.5%	40.8%	1.7%

- 81.6% of all fixed broadband subscriptions were equal to or greater than 30Mbps in Q4 2020.

Figure 4 - FTTP Subscription Market Share

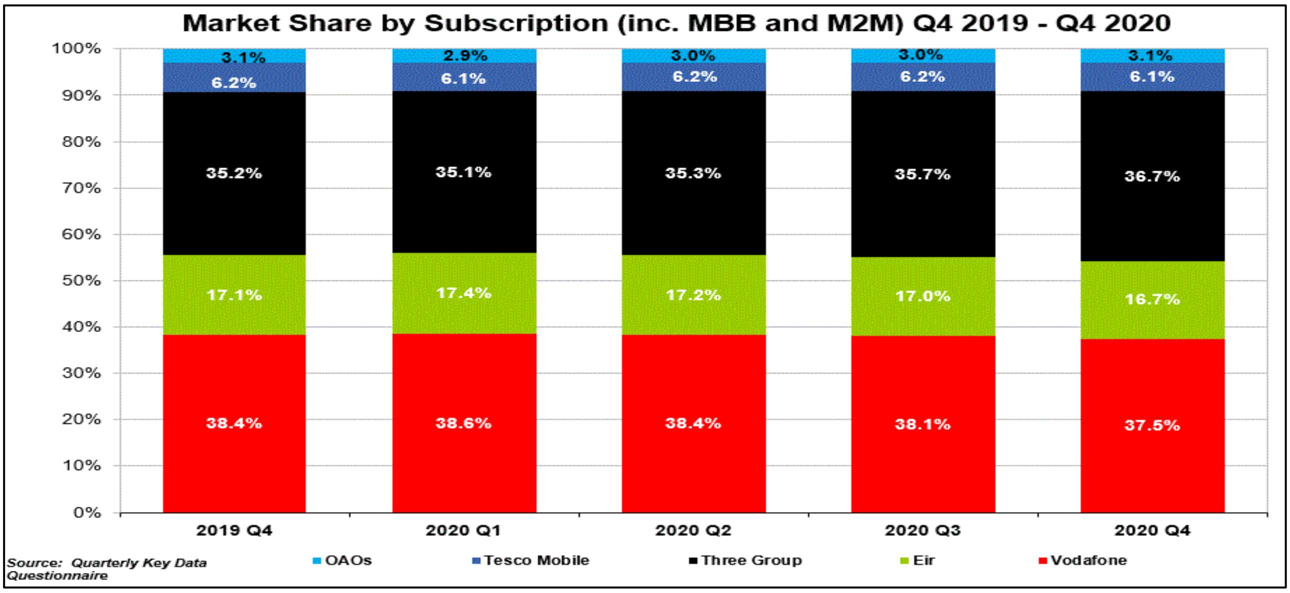


- In Q4 2020, Vodafone had 38.5% of retail FTTP subscriptions, followed by Eir at 35.3%, Sky Ireland at 12.0%, Virgin Media at 4.7% and Digiweb at 2.2% market share.
- Pure Telecom has surpassed the 2% market share threshold in Q4 2020 with a at 2.8% market share.
- OAOs combined accounted for the remaining 4.4% market share.

Mobile Market

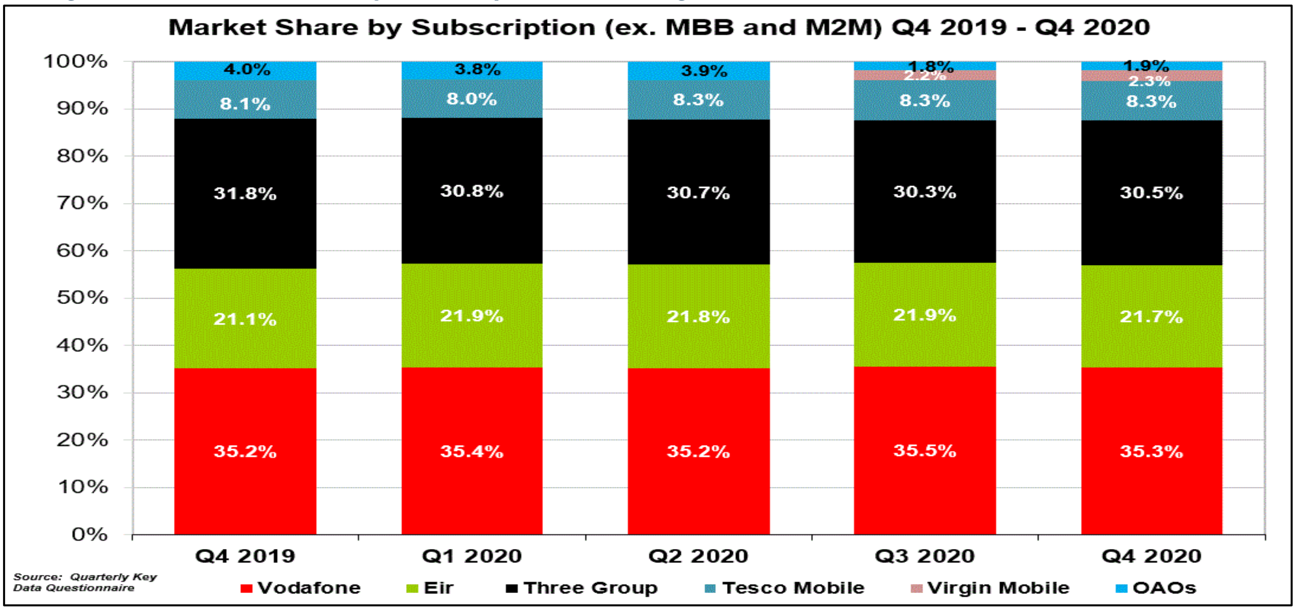
At the end of Q4 2020 there were 7,139,486 mobile subscriptions in Ireland, including mobile broadband and Machine to Machine ('M2M'). If mobile broadband subscriptions (330,671) and M2M subscriptions (1,574,788) are excluded, the total number of mobile subscriptions was 5,234,027.

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



- In Q4 2020 Vodafone had the largest share of mobile subscriptions including MBB and M2M at 37.5%, this was followed by Three with 36.7%, Eir with 16.7%, Tesco Mobile at 6.1% and OAOs at 3.1%.

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



- In Q4 2020 Vodafone had the highest market share excluding mobile broadband and M2M (35.3%), followed by Three Group (30.5%), Eir (21.7%), Tesco Mobile (8.3%), Virgin Mobile (2.3%) and OAOs (1.9%).

Corrigendum to Q3 2020 QKDR

Note 1: Standard 3G traffic, Standard 4G traffic, MBB 3G traffic, MBB 4G traffic were revised for Q3 2020 following revisions from Eir Mobile. Total Mobile Data Traffic was impacted by these revisions.

Note 2: VDSL traffic was revised for Q3 2020 following revisions from Imagine Telecommunications. Total Fixed Broadband Data Traffic (GB), VDSL Broadband Data Traffic (GB), Fixed Broadband Traffic from Residential Subscriptions (GB) were impacted by these revisions.

Note 3: VOB minutes were revised for Q3 2020 following revisions from Goldfish Ltd. Total Fixed Voice Traffic, Total Voice Traffic, Domestic Fixed to Fixed Minutes and VOB Minutes were impacted by these revisions.

Note 4: Roaming SMS/MMS and international roaming data traffic were revised for Q3 2020 following revisions from Three Ireland. Roaming Data Traffic, Roaming SMS/MMS Traffic were impacted by these revisions.

Note 5: Bitstream DSL and FTTP revenues were revised for Q3 2020 following revisions from Magnet Networks Ltd. Total Fixed Line Retail Revenues, Total Retail Market Revenues, Market Share by Fixed Line Retail and Wholesale Revenue.

Other Notes

From Q4 2020 ComReg had intended to commence the inclusion of mobile metrics regarding 5G. However, due to systems and other issues Eir has been unable to provide their 5G subscriber and consumption figures and Vodafone has been unable to provide the 5G consumption figures to ComReg.

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) .