An Coimisiún um Rialáil Cumarsáide
Commission for Communications Regulation

Date: 09/09/2021

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q2 2021

QKDR DATA PORTAL

Access the latest statistical information on Electronic Communication Services

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

Reference: ComReg 21/88

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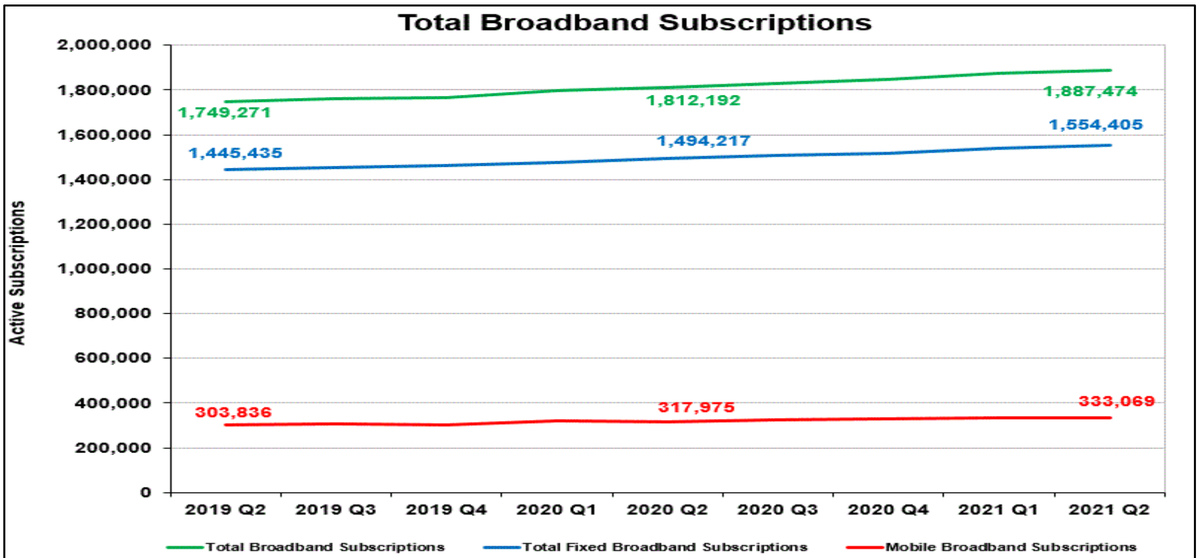
Q2 2021 Key Quarterly Trends

0.8% Increase in Fixed broadband subscriptions

309k (+9.5%) Total FTTP broadband subscriptions

13% Decrease in fixed broadband traffic

10% Increase in M2M subscriptions



Source: Quarterly Key Data Questionnaire

Roaming Data Traffic increased by 41% QoQ

Mobile SMS Traffic increased by 20% QoQ

FTTP Subscriptions with speeds >=500Mbps increased 22% 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 April 2021 to 30th June 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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  - Figure 6 – Retail Market Shares by Subscription excluding Mobile Broadband (MBB) and Machine to Machine (M2M)
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Overview of Irish Communications Market Q2 2021

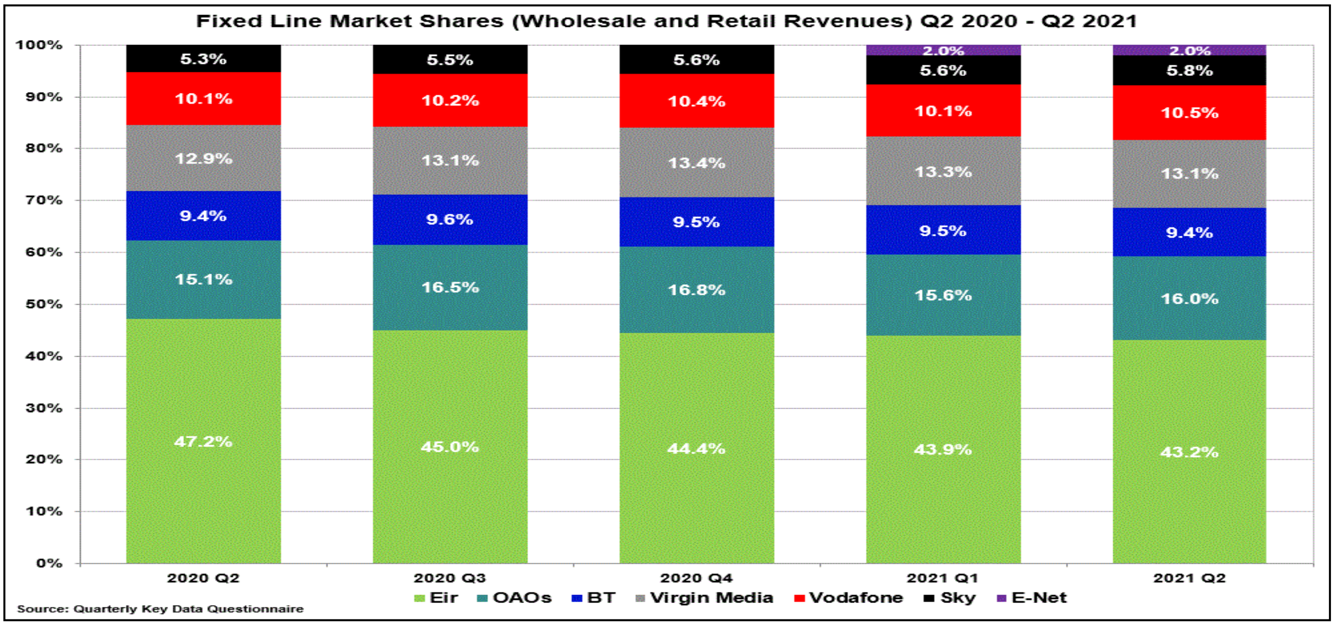
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q2 2021				
	Q2 2021	Q1 2021	Quarterly Change	Annual Change
Total Retail Market Revenues	€852,477,365	€855,681,832	-0.4%	0.8%
Fixed Line Retail Revenues	€327,371,946	€332,692,883	-1.6%	-3.6%
Mobile Retail Revenues	€381,991,526	€379,763,221	0.6%	0.5%
Broadcasting Retail Revenues	€143,113,892	€143,225,728	-0.1%	13.3%
Fixed Line Wholesale Revenues	€138,035,986	€133,888,680	3.1%	7.5%
Mobile Wholesale Revenues	€35,559,000	€33,644,000	5.7%	-7.6%
Total Voice Traffic (Minutes)	4,145,567,638	4,187,363,961	-1.0%	-7.2%
Fixed Voice Traffic (Minutes)	567,531,361	667,128,360	-14.9%	-21.7%
Mobile Voice Traffic (Minutes)	3,578,036,277	3,520,235,601	1.6%	-4.4%
Fixed Broadband Subscriptions	1,554,405	1,541,650	0.8%	4.0%
Fixed Subscriptions	2,239,441	2,210,830	1.3%	1.1%
Fixed Voice Subscriptions	1,337,815	1,321,311	1.2%	-2.7%
Total Mobile Subscriptions	7,404,191	7,181,054	3.1%	9.9%
Machine to Machine Subscriptions	1,792,432	1,630,749	9.9%	32.5%
Mobile Broadband Subscriptions	333,069	333,075	0.0%	4.7%
Mobile Voice Subscriptions	5,278,715	5,217,230	1.2%	4.2%
Total Fixed Broadband Data Traffic (GB)	1,511,002,388	1,734,547,550	-12.9%	9.9%
Mobile Broadband (Dongles) Data Traffic (GB)	68,469,206	72,337,341	-5.4%	26.9%
Standard Mobile Subscriptions Data Traffic (GB)	159,830,854	159,968,555	-0.1%	26.6%
Total Mobile Data Volumes (GB)	229,221	236,390	-3.0%	26.4%

Fixed Market

- In Q2 2021, Eir had the highest revenue share in the fixed market with a 43.2% 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 40.8% share of total (retail and wholesale) industry revenue, while Other Authorised Operators (OAOs) account for the remaining 16.0% share.

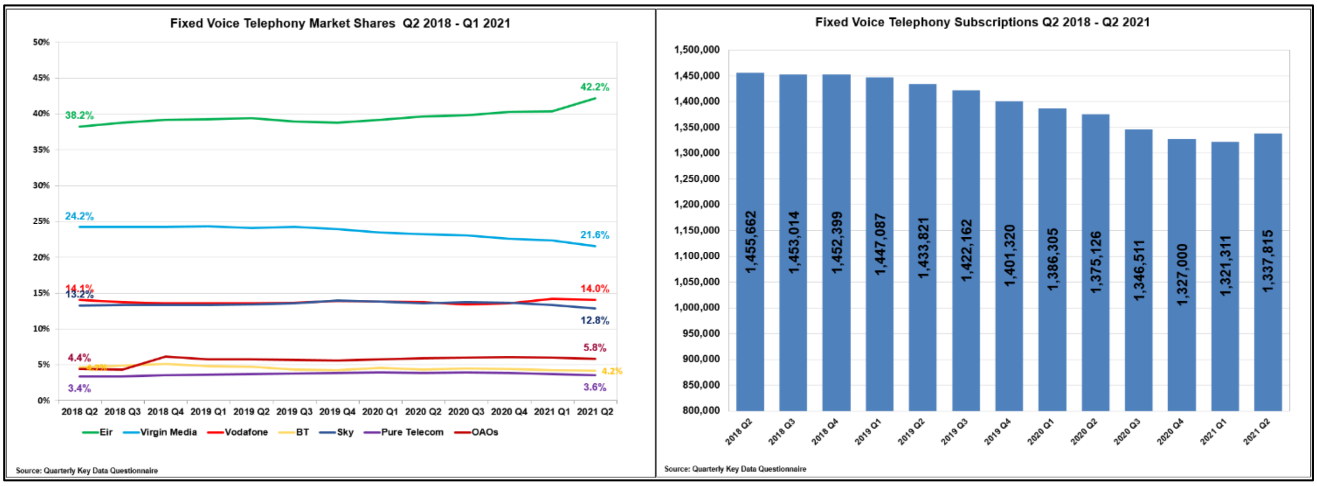
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Fixed voice traffic in Q2 2021 was over 567 million minutes, which was a 14.9% decrease on Q1 2021 and a decrease of 21.7% since Q2 2020. Managed voice over broadband (VoB) minutes account for approximately 26.2% of total fixed voice minutes, up from 23.2% in Q2 2020.

Figure 2 – Retail Fixed Voice Subscriptions



- At the end of Q2 2021 there were 1,337,815 fixed voice subscriptions (an increase of 1.25% since Q1 2021 and a decrease of 2.71% on Q2 2020).
- As of Q2 2021 Eir had 42.2% of all fixed voice subscriptions followed by Virgin Media (21.6%), Vodafone (14.0%), Sky (12.8%) and Pure Telecom (3.6%). OAOs accounted for the remaining 5.8% of fixed voice subscriptions.

Retail Broadband Market

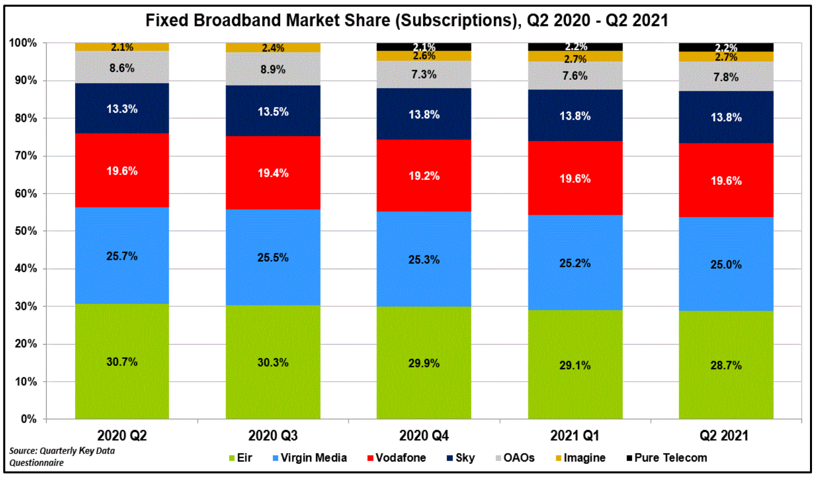
At the end of June 2021, there were 1.887 million active broadband subscriptions in Ireland. This was an increase of 0.7% on the previous quarter and a 4.2% increase on Q2 2020.

Table 2 - Total Number of Active Broadband Subscriptions

Subscription Type	Q2 2021	Quarterly Growth Q1'21 – Q2'21	Annual Growth Q2'20 – Q2'21
DSL Broadband	165,624	-5.68%	-23.08%
VDSL Broadband	625,460	-1.45%	-2.87%
Cable Broadband	376,979	-0.16%	0.71%
FTTP Broadband	308,924	9.53%	53.59%
Satellite Broadband	2,079	-9.21%	-32.65%
FWA Broadband	75,339	8.40%	33.58%
Total Fixed Broadband	1,554,405	0.83%	4.03%
Mobile Broadband	333,069	0.00%	4.75%
Total Broadband	**1,887,474**	**0.68%**	4.15%

- Subscriptions for FTTP (+9.5%) and FWA (+8.4%) showed positive growth this quarter. VDSL (-1.5%), DSL (-5.7%) , Cable (-0.2%) and Satellite (-9.2%) subscriptions all fell this quarter while Mobile Broadband decreased by less than a percent (0%).

Figure 3 – Retail Fixed Broadband Market Shares based on Subscriptions



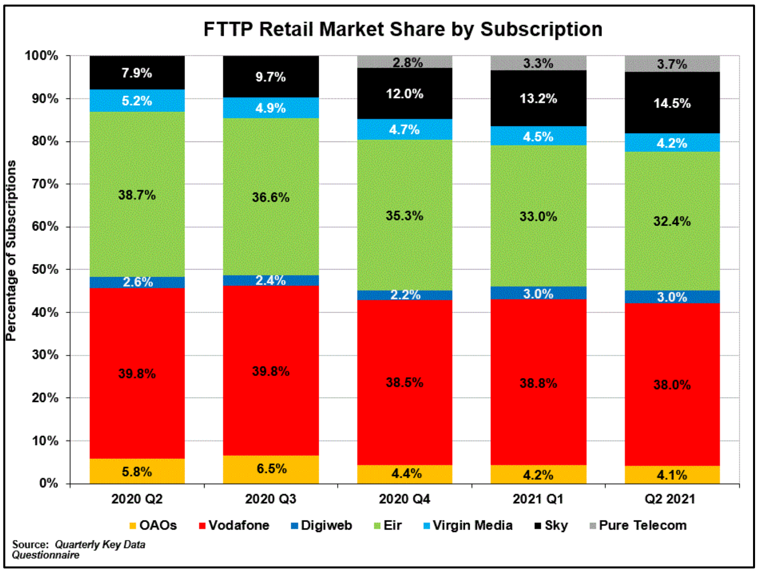
- In Q2 2021, Eir had 28.7% of total retail fixed broadband subscriptions, followed by Virgin Media who had 25.0% of subscriptions. Vodafone had 19.6% (excluding mobile broadband subscriptions), Sky Ireland 13.8% and Imagine and Pure Telecom had 2.7% and 2.2% market share respectively.
- All other OAOs combined accounted for the remaining 7.8% share of retail fixed broadband subscriptions.

Table 3 - Retail Fixed Broadband Subscriptions by Sold Download Speed

Fixed Broadband Subscriptions by Sold Speed	Q2 2021	Q1 2021	Quarterly Change
<2Mbps	0.7%	0.7%	-0.03%
2Mbps – 9.99Mbps	6.2%	6.4%	-0.19%
=10Mbps – 29.99bps	9.0%	10.0%	-1.02%
=30Mbps – 99.99Mbps	37.7%	38.0%	-0.27%
>=100Mbps	46.4%	44.9%	1.51%

- 84.11% of all fixed broadband subscriptions were equal to or greater than 30Mbps in Q2 2021.

Figure 4 - FTTP Subscription Market Share

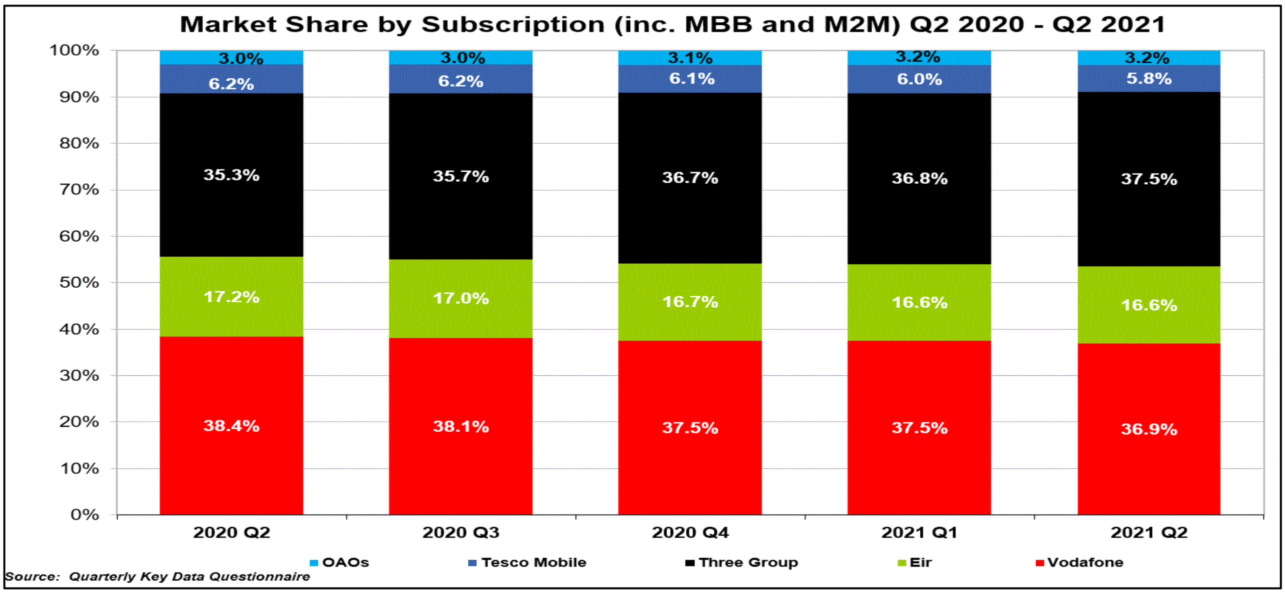


- In Q2 2021, Vodafone had 38.0% of retail FTTP subscriptions, followed by Eir at 32.4%, Sky Ireland at 14.5%, Virgin Media at 4.2%, Digiweb at 3.0% and Pure Telecom at 3.7% market share.
- OAOs combined accounted for the remaining 4.2% market share.

Mobile Market

At the end of Q2 2021 there were 7,404,216 mobile subscriptions in Ireland, including mobile broadband and Machine to Machine (‘M2M’). If mobile broadband subscriptions (333,069) and M2M subscriptions (1,630,749) are excluded, the total number of mobile subscriptions was 5,278,715.

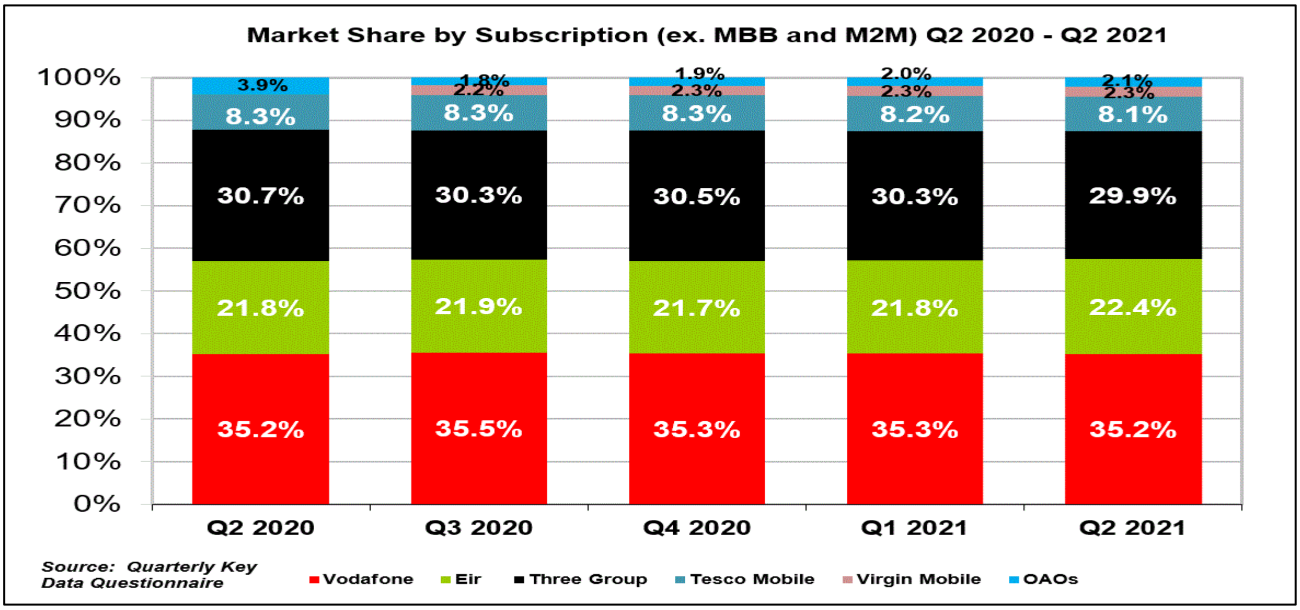
Figure 5 - Market Shares by Subscription including Mobile Broadband and Machine to Machine



- In Q2 2021 Three had the largest share of mobile subscriptions including MBB and M2M at (37.5%). This was followed by Vodafone with (36.9%), Eir with (16.6%), Tesco Mobile at (5.8%) and OAOs at (3.2%).

- In Q2 2021 Vodafone had the highest market share excluding mobile broadband and M2M (35.2%), followed by Three Group (29.9%), Eir (22.4%), Tesco Mobile (8.1%), Virgin Mobile (2.3%) and OAOs (2.1%).
- In addition to Q1 2021, Eir Mobile were unable to produce section 4 data Q2 2021.This has resulted in estimations in the following categories – no. of subscriptions by technology, no. of dedicated MBB subscriptions, M2M subscriptions, traffic for standard mobile subscriptions, dedicated mobile broadband subscriptions, and total traffic.

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



Corrigendum to Q1 2020 – Q1 2021 QKDR

Note 1: Fixed Broadband Subscriptions by Sold Download Speeds % & Fixed Broadband Platform Subscriptions by Sold Speed were revised for Q1 2020 & Q3 2020 – Q1 2021 following revisions from Vodafone Ireland Limited.

Note 2: Fixed Subscriptions were revised for Q1 2021 following revisions from EU Networks.

Note 3: Fixed Broadband Subscriptions by Sold Download Speeds % were revised for Q2 2020– Q1 2021 following revisions from Sky Ireland.

Note 4: Leased Line and Managed Data Retail Revenues & Total Fixed Line Retail Revenues were revised for Q1 2021 following revisions from Virgin Media Business.

Note 6: Fixed Data Traffic were revised for Q1 2021 following revisions from Three Ireland (Hutchinson).

Note 7: FTTP Subscriptions, Market Share by FTTP Broadband Subscription, Market Share by Fixed Broadband Subscription, Internet Subscriptions were revised for Q1 2021 following revisions from Digiweb.

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 for Q4 2020 – Q2 2021 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) .