An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q3 2022

Information Notice

Reference:	ComReg 22/101
Version:	Final
Date:	08/12/2022

An Coimisiún um Rialáil Cumarsáide
Commission for Communications Regulation
1 Lárcheantar na nDugaí, Sráid na nGildeanna, BÁC 1, Éire, D01 E4X0.
One Dockland Central, Guild Street, Dublin 1, Ireland, D01 E4X0.
Teil | Tel +353 1 804 9600 Suíomh | Web www.comreg.ie

Content

Section

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. Please note Broadband Subscriptions were renamed to Subscriber Lines in Q1 2022 to accurately reflect the definition of the data provided. The detailed presentation of data 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 2022 to 30th September 2022. The report is based on submissions from 47 active operators.

The report contains the following key charts/data

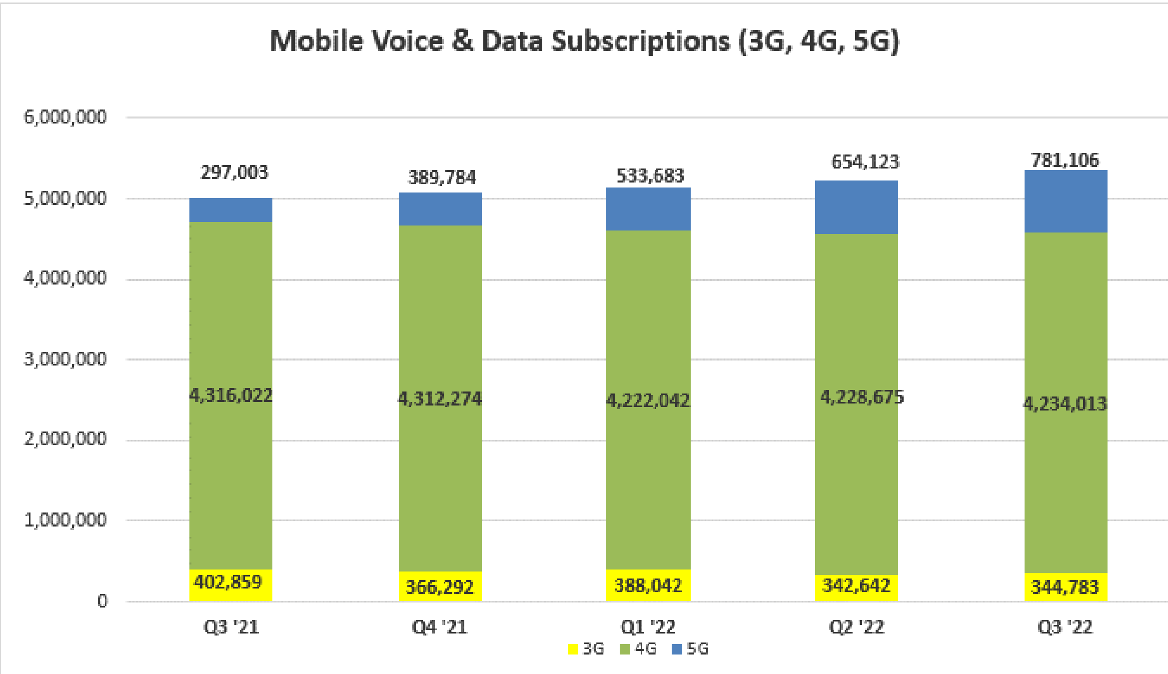
- Overview of Markets
    - Table 1 – Communications Summary
- Fixed Markets
    - Figure 1 – Fixed Line Market Shares based on Wholesale and Retail Revenue
  - Fixed Voice
    - Figure 2 – Retail Fixed Voice Subscriptions
  - Broadband Market
    - Table 2 – Total Number of Active Subscriber Broadband Lines
    - Figure 3 – Retail Fixed Broadband Market Shares based on Subscriber Lines
    - Table 3 – Retail Fixed Broadband Subscriber Lines by Sold Download Speed
    - Figure 4 – Retail FTTP Subscriber Lines 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

Q3 2022 Key Quarterly Trends

1.6M (+2.2% YoY) Fixed broadband subscriber lines

463k (+36.2% YoY) FTTP subscriptions

796k (167.5% YoY) 5G mobile subscriptions (Voice & MBB)



DSL broadband subscriber lines decreased 20.1% YoY

&

VDSL broadband subscriber lines decreased 9.3% YoY

Mobile subscriptions increased 13% YoY

&

Mobile traffic increased 23.3% YoY

28% of broadband subscriber lines have a speed of >=500Mbps In Q3 2022

Overview of Irish Communications Market Q3 2022

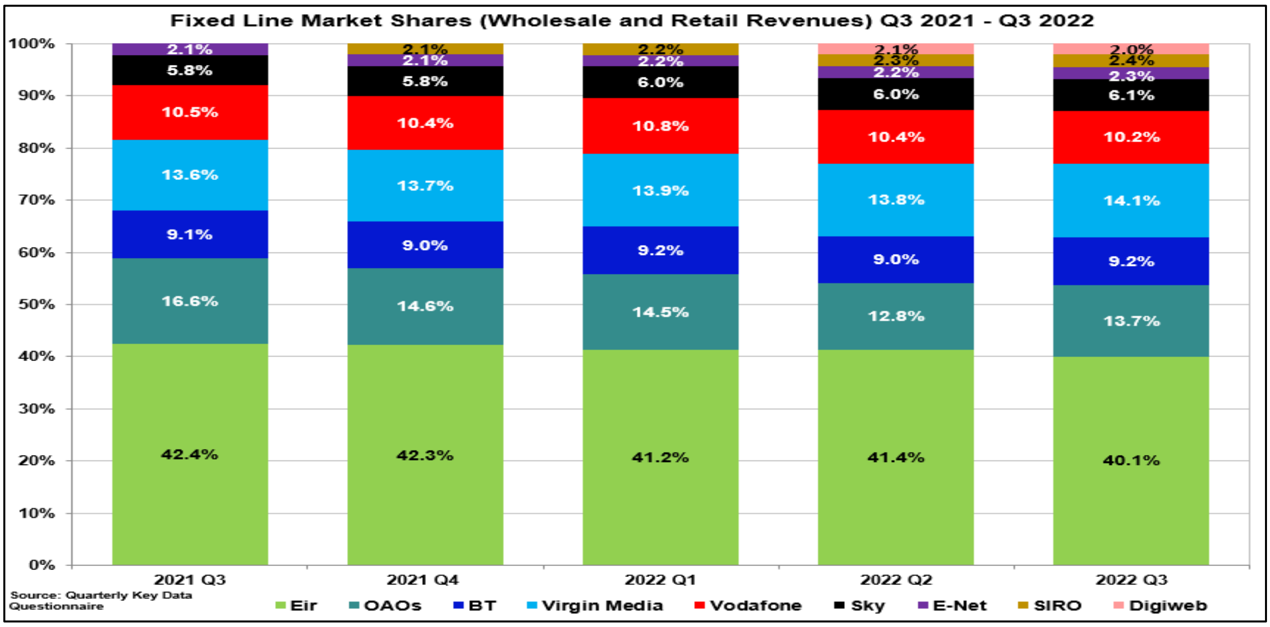
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q3 2022				
	Q2 2022	Q3 2022	Quarterly Change	Annual Change
Total Retail Market Revenues	€864,232.122	€888,338.920	2.8%	2.7%
Fixed Line Retail Revenues	€317,466.602	€320,800.829	1.1%	-1.3%
Mobile Retail Revenues	€397,756.446	€418,542.264	5.2%	6.8%
Broadcasting Retail Revenues	€149,008.074	€148,995.826	0.0%	0.8%
Fixed Line Wholesale Revenues	€141,635.159	€141,390.715	-0.2%	2.3%
Mobile Wholesale Revenues	€34,853.000	€37,439.301	7.4%	-3.8%
Total Voice Traffic (Minutes)	3,686,918,083	3,575,466,544	-3.0%	-9.0%
Fixed Voice Traffic (Minutes)	431,776,881	401,294,768	-7.1%	-22.0%
Mobile Voice Traffic (Minutes)	3,255,142.202	3,174,171,786	-2.5%	-7.1%
Fixed Broadband Subscriber Lines	1,595,096	1,600,628	0.4%	2.2%
Total Fixed Subscriptions	2,164,275	2,154,575	-0.5%	-2.1%
Fixed Voice Subscriptions	1,257,278	1,237,853	-1.6%	-5.6%
Total Mobile Subscriptions	8,357,695	8,628,393	3.2%	13.0%
Machine to Machine Subscriptions	2,492,123	2,657,185	6.6%	33.5%
Mobile Broadband Subscriptions	357,746	352,161	-1.6%	1.1%
Mobile Voice Subscriptions	5,507,826	5,619,047	2.0%	6.0%
Total Fixed Broadband Data Traffic (GB)	1,568,793,113	1,702,583,209	8.5%	16.3%
Mobile Broadband (Dongles) Data Traffic (GB)	91,988,338	92,077,657	0.1%	16.8%
Standard Mobile Subscriptions Data Traffic (GB)	215,610,156	231,375,195	3.6%	13.6%
Total Mobile Data Volumes (GB)	317,073,272	337,530,407	6.5%	23.4%

Fixed Market

- In Q3 2022, Eir had the highest revenue share (retail and wholesale) in the fixed market at 40.1%.
- ComReg estimates that the next seven largest operators (BT Ireland, Sky Ireland, Virgin Media Ireland, Vodafone (fixed only), E-Net, SIRO & Digiweb) contribute a further 46.3% share of total industry revenue.
- Other Authorised Operators (OAOs) account for the remaining 13.7% share.

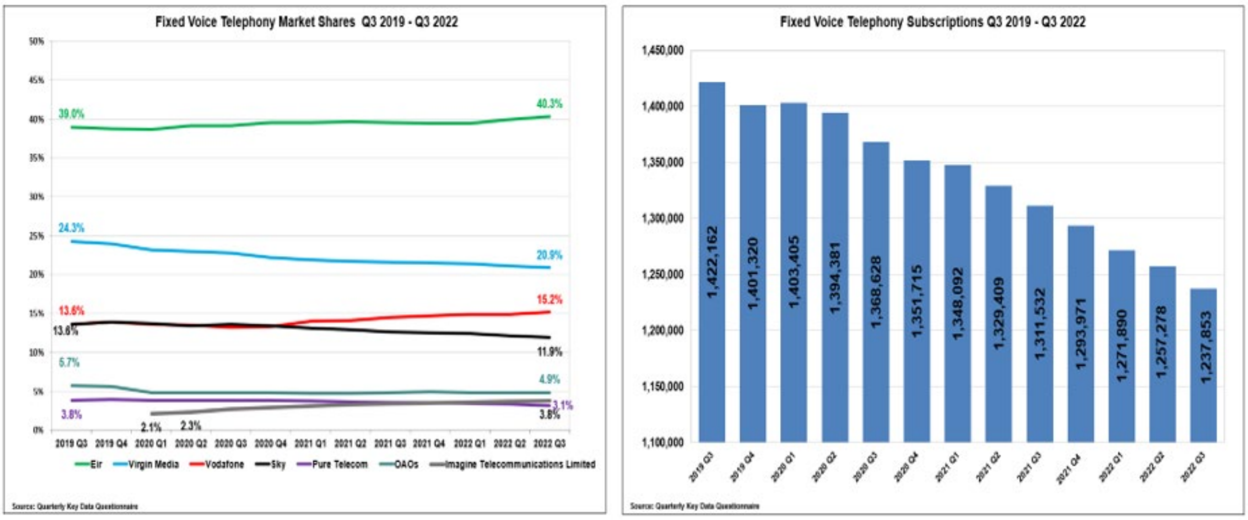
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Fixed voice traffic in Q3 2022 was over 401 million minutes, which was a 7.1% decrease on Q2 2022 and a decrease of 22.0% since Q3 2021. Managed voice over broadband (VoB) minutes account for approximately 25.9% of total fixed voice minutes, with Q3 2021 standing at 27.3%.

Figure 2 – Retail Fixed Voice Subscriptions



- At the end of Q3 2022 there were 1,237,853 fixed voice subscriptions (a decrease of 1.6% since Q2 2022 and a decrease of 5.6% on Q3 2021).
- As of Q3 2022 Eir had 40.3% of all fixed voice subscriptions followed by Virgin Media (20.9%), Vodafone (15.2%), Sky (11.9%), Imagine Telecommunications Limited (3.8%) & Pure Telecom (3.1%). OAOs accounted for the remaining 4.9% of fixed voice subscriptions.

Retail Broadband Market

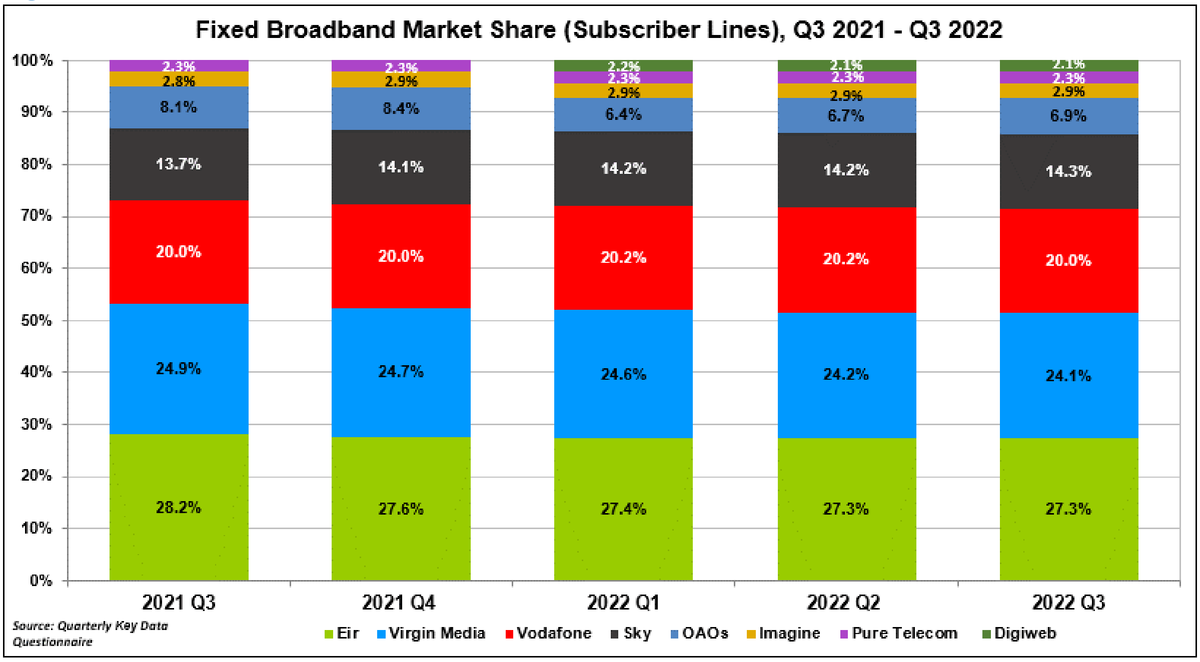
At the end of September 2022, there were 1.95 million active broadband subscriber lines in Ireland. This is unchanged from the previous quarter and a 1.9% increase on Q3 2021.

Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q3 2022	Quarterly Growth Q2'22 – Q3'22	Annual Growth Q3'21 – Q3'22
Cable Broadband	369,242	-0.9%	-2.2%
DSL Broadband	124,795	-5.8%	-20.1%
VDSL Broadband	555,696	-2.7%	-9.3%
FTTP Broadband	465,253	7.4%	36.0%
Satellite Broadband	3,533	7.2%	84.8%
FWA Broadband	84,109	-0.3%	9.0%
Total Fixed Broadband	1,600,628	0.4%	2.2%
Mobile Broadband	352,161	-1.6%	1.1%
Total Broadband	**1,952,789**	**0.0%**	**2.0%**

- Lines for FTTP (+7.4%) and Satellite (7.2%) showed positive growth this quarter. VDSL (-2.7%), DSL (-5.8%), FWA (-0.3%), Mobile Broadband (-1.6%) and Cable (-0.9%) subscriber lines all fell this quarter.

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



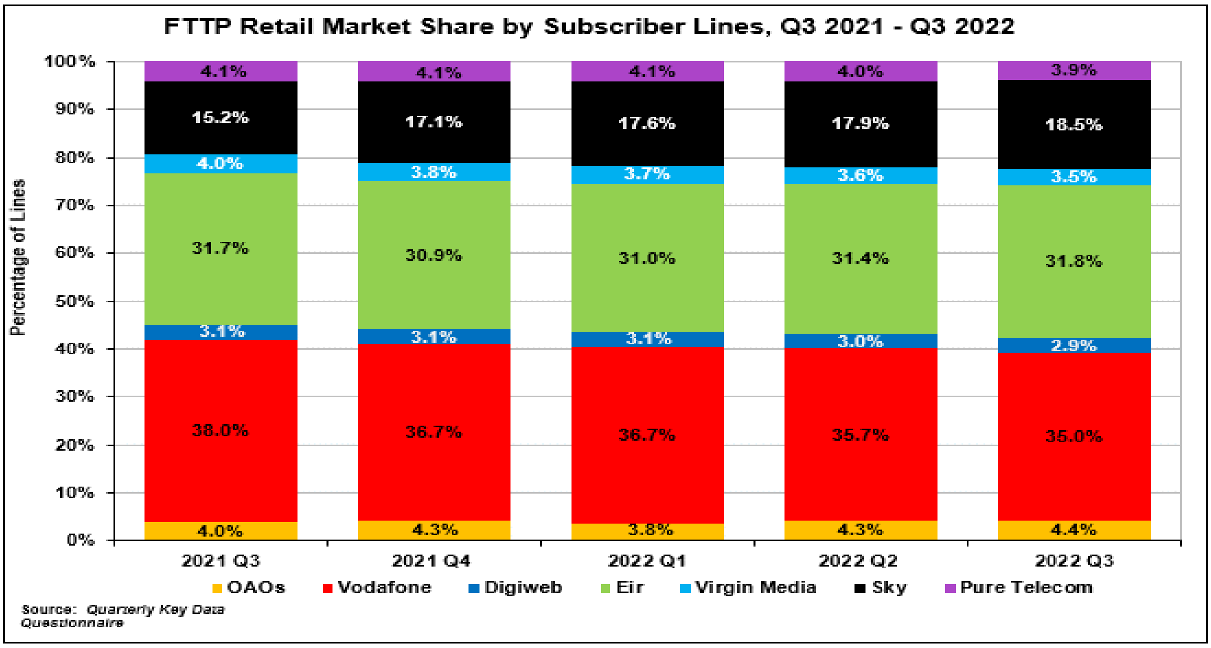
- In Q3 2022, Eir had 27.3% of total retail fixed broadband subscriber lines, followed by Virgin Media who had 24.1% of lines. Vodafone had 20.0% (excluding mobile broadband), Sky Ireland 14.3%, Imagine 2.9%, Pure Telecom 2.3% and Digiweb 2.1% market share.
- All other OAOs combined accounted for the remaining 6.9% 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	Q3 2022	Q2 2022	Quarterly Change
<2Mbps - 9.99Mbps	4.7%	5.0%	-0.3%
=10Mbps - 29.99Mbps	6.6%	6.9%	-0.3%
=30Mbps - 99.99Mbps	33.6%	34.7%	-1.1%
=100Mbps - 499.99Mbps	27.1%	28.6%	-1.5%
=500Mbps - 999.99Mbps	19.9%	17.0%	+2.9%
>=1GB	8.0%	7.7%	+0.3%

- 88.7% of all fixed broadband subscriber lines had sold speeds which were equal to or greater than 30Mbps in Q3 2022.

Figure 4 - FTTP Subscriber Line Market Share

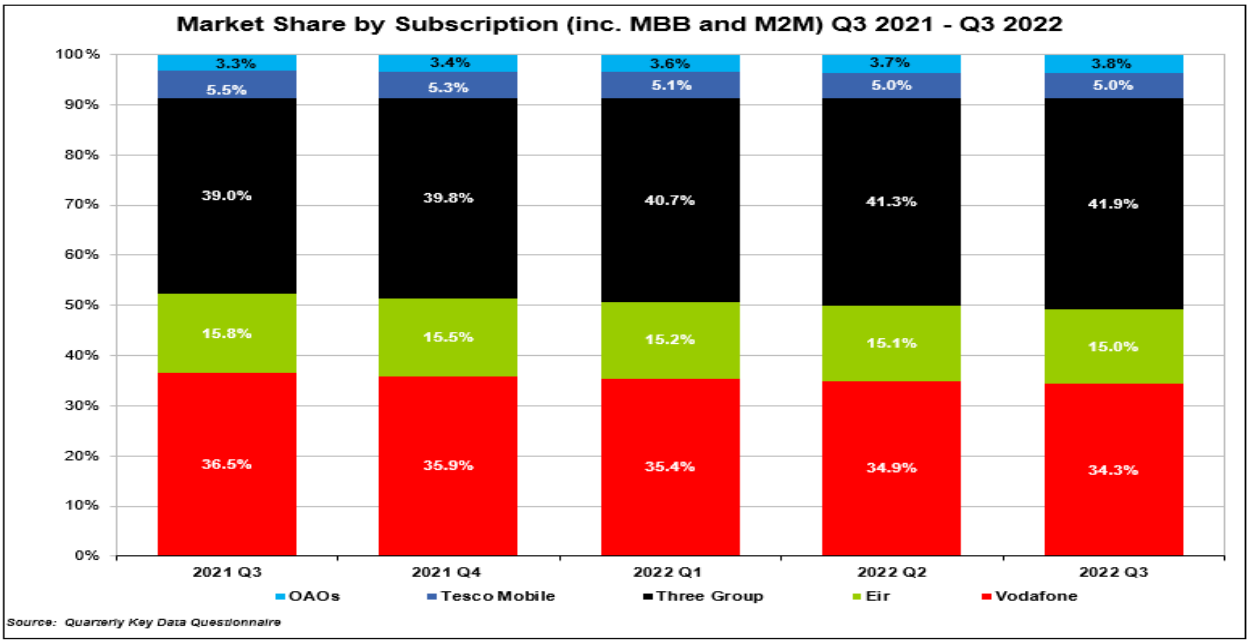


- In Q3 2022, Vodafone had 35.0% of retail FTTP subscriber lines, followed by Eir at 31.8%, Sky Ireland at 18.5%, Pure Telecom at 3.9%, Virgin Media at 3.5%, and Digiweb at 2.9% market share. OAOs accounted for the remaining 4.4%

Mobile Market

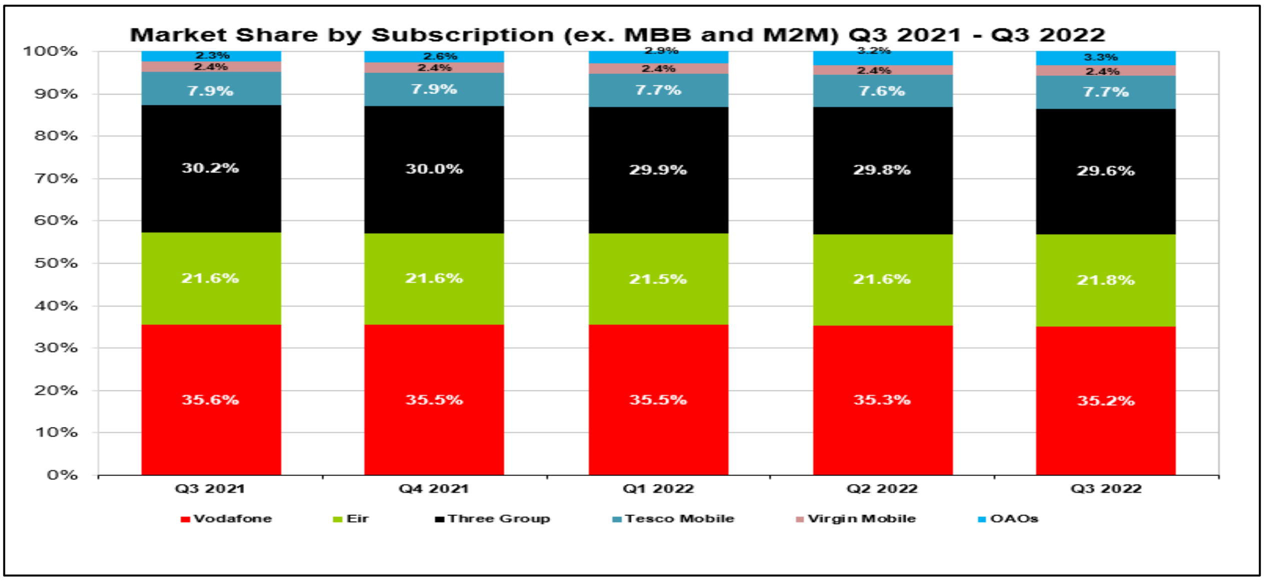
At the end of Q3 2022 there were 8,628,393 mobile subscriptions in Ireland, including mobile broadband ('MBB') and Machine to Machine ('M2M'). If mobile broadband subscriptions (352,161) and M2M subscriptions (2,657,185) are excluded, the total number of mobile subscriptions was 5,619,047.

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



- In Q3 2022 Three had the largest share of mobile subscriptions including MBB and M2M at 41.9%. This was followed by Vodafone with 34.3%, Eir with 15.0%, Tesco Mobile at 5.0% and OAOs at 3.8%.
- In Q3 2022 Vodafone had the highest market share excluding mobile broadband and M2M (35.2%), followed by Three (29.6%), Eir (21.8%), Tesco Mobile (7.7%), Virgin Mobile (2.4%) and OAOs (3.3%).
- There were 1,448,151 **2G**, 1,348,397 **3G**, 5,035,241 **4G** and 796,604 **5G** mobile subscriptions in Q3.

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



CORRIGENDUM TO Q3 2021 – Q2 2022 QKDR

Note 1: Ethernet leased line revenues were revised between -239k – 229k for Q2 2022 following revisions received from BT.

Note 2: VOB minutes to PSTN, Mobile and International outgoing were revised following revisions from Blueface.

Note 3: FWA traffic increased by 192GB for Q1 2022 following revisions submitted by Digital Forge.

Note 4: Change to market shares and revenues related to retail leased lines for Q1 following revisions from Verizon.

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.

This document does not constitute commercial or other advice. No warranty, representation or undertaking of any kind, express or implied, is given in relation to the information and statistics contained within this document.

To the fullest extent permitted by law, neither the Commission for Communications Regulation (“ComReg”) nor any of its employees, servants or agents will be liable for any loss or damage arising out of or in connection with your use of, or any reliance whatsoever placed on this document (including, but not limited to, indirect or consequential loss or damages, loss of income, profit or opportunity, loss of or damage to property and claims of third parties) even if ComReg has been advised of the possibility of such loss or damages or such loss or damages were reasonably foreseeable.