Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q1 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. Please note Fixed Voice subscriptions were renamed to Fixed Voice subscriber lines in Q1 2023 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 January 2023 to 31st March 2023. The report is based on submissions from 49 active operators.

The report contains the following key charts/data

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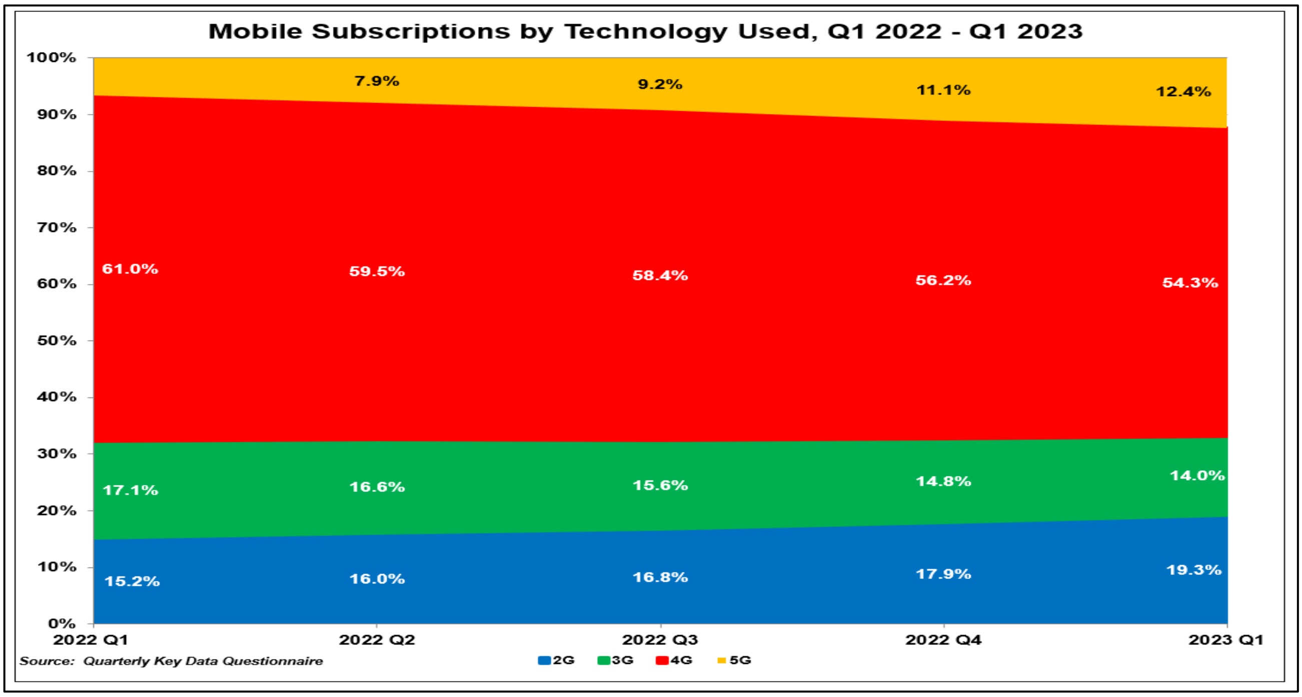
2 Q1 2023 Key Quarterly Trends

Total Fixed Broadband Subscriber Lines	Total Retail Market Revenue	FTTP Subscriber Lines	5G Mobile Subscribers(Incl. MBB & M2M)
1.61m	**887m**	**537k**	**1.1m**
(+0.4% QoQ)	(-3.9% QoQ)	(+7.3% QoQ)	(+14.2% QoQ)
(+1.9% YoY)	(+2.5% YoY)	(+34.2% YoY)	(+109.2% YoY)



Quarterly Trends

DSL residential broadband lines	(8%)
DSL business broadband lines	(3%)
VDSL residential broadband lines	(5%)
Mobile retail revenues	(7%)
Roaming mobile traffic	(9%)

FTTP broadband business lines	(5%)
Satellite residential broadband lines	(21%)
Residential broadband lines >=1GB	(6%)
5G mobile subscriptions	(14%)
5G mobile traffic	(23%)

3 Overview of Irish Communications Market Q1 2023

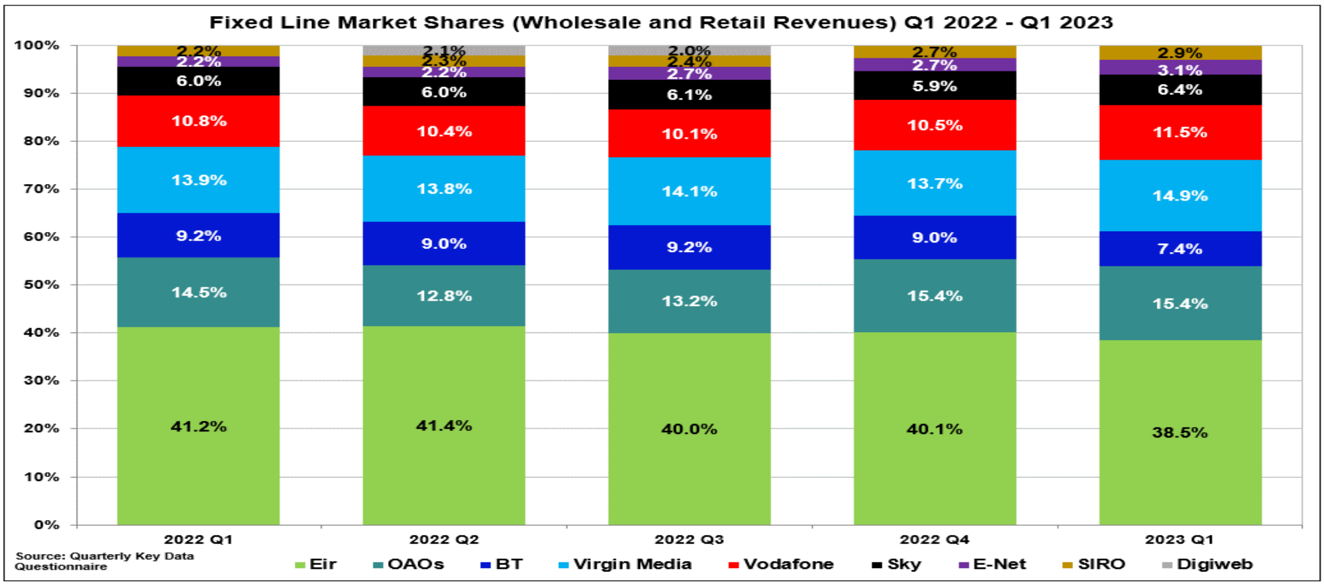
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q1 2023				
	Q4 2022	**Q1 2023**	**Quarterly Change**	**Annual Change**
Total Retail Market Revenues	€923,287.144	€886,654,755	-4.0%	2.5%
Fixed Line Retail Revenues	€328,403.545	€332,347,000	1.2%	3.0%
Mobile Retail Revenues	€445,878,576	€412,916,755	-7.4%	5.5%
Broadcasting Retail Revenues	€149,005,023	€141,391,000	-5.1%	-6.1%
Fixed Line Wholesale Revenues	€145,165,995	€149,986,000	3.3%	7.8%
Mobile Wholesale Revenues	€37,266,937	€32,741,000	-12.9%	-3.4%
Total Voice Traffic (Minutes)	3,600,559,565	3,522,741,568	-2.2%	-6.7%
Fixed Voice Traffic (Minutes)	399,855,167	371,001,000	-7.22%	-19.31%
Mobile Voice Traffic (Minutes)	3,200,704,398	3,151,740,380	-1.5%	-5.0%
Fixed Broadband Subscriber Lines	1,611,509	1,617,845	0.4%	1.9%
Total Fixed Subscriber Lines	2,143,447	2,426,865	13.2%	11.7%
Fixed Voice Subscriber Lines	1,222,437	1,228,979	0.5%	-3.4%
Total Mobile Subscriptions	8,897,507	9,067,419	1.9%	11.7%
Machine to Machine Subscriptions	2,852,401	3,056,326	7.1%	30.0%
Mobile Broadband Subscriptions	355,089	339,293	-4.4%	-4.0%
Mobile Voice Subscriptions	5,576,759	5,572,787	-0.1%	8.3%
Total Fixed Broadband Data Traffic (GB)	1,916,477,556	1,865,702,910	-2.7%	12.6%
Mobile Broadband (Dongles) Data Traffic (GB)	91,632,055	91,022,019	0.67%	-2.1%
Standard Mobile Subscriptions Data Traffic (GB)	253,215,437	261,736,226	3.4%	28.5%
Total Mobile Data Volumes (GB)	354,779,816	361,788,216	-2.0%	19.2%

Fixed Market

- In Q1 2023, Eir had the highest revenue share (retail and wholesale) in the fixed market at 38.5%.
- ComReg estimates that the next seven largest operators (BT Ireland, Sky Ireland, Virgin Media Ireland, Vodafone (fixed only), E-Net & SIRO) contribute a further 46.1% share of total industry revenue.
- Other Authorised Operators (OAOs) account for the remaining 15.4% share.

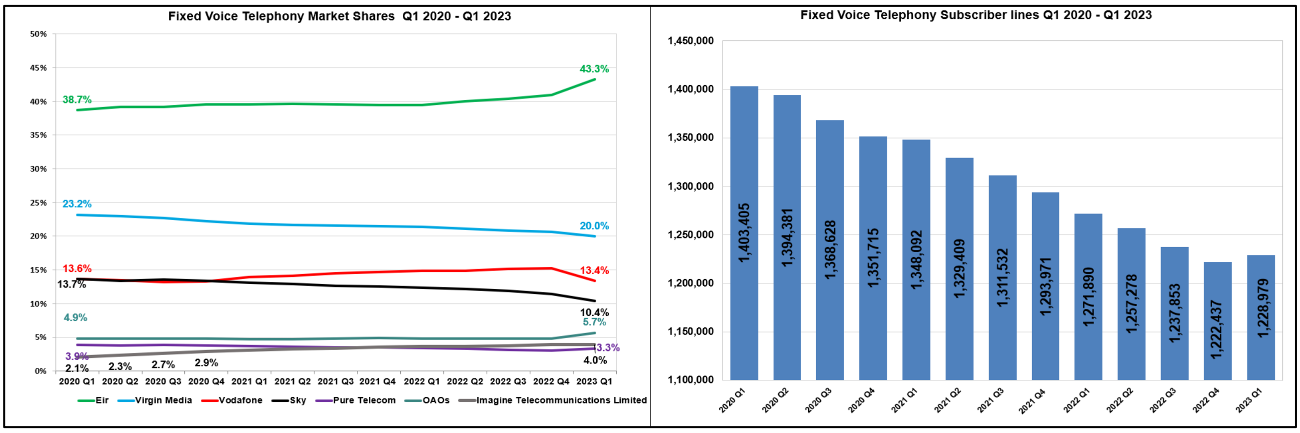
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



4 Retail Fixed Voice Market

Fixed voice traffic in Q1 2023 was over 371 million minutes, which was a 7.2% decrease on Q4 2022 and a decrease of 19.3% since Q1 2023. Estimates were used for fixed voice traffic in Q1 2023 as the data received from operators via new collection system shows some anomolies relative to previous quarters.

Figure 2 – Retail Fixed Voice Subscriber lines



- At the end of Q1 2023 there were 1,228,979 fixed voice subscriber lines (an increase of 0.5% since Q4 2022 and a decrease of 3.4% on Q1 2022). The increase is due to a methodology change for Q1 2023 reporting; subscriptions (which may include multiple lines associated with a particular subscription) are no longer collected and reported. Fixed voice line data are collected instead.

- As of Q1 2023 Eir had 43.3% of all fixed voice subscriber lines followed by Virgin Media (20.0%), Vodafone (13.4%), Sky (10.4%), Imagine Telecommunications Limited (4.0%) & Pure Telecom (3.3%). OAOs accounted for the remaining 5.7% of fixed voice subscriber lines.

5 Retail Broadband Market

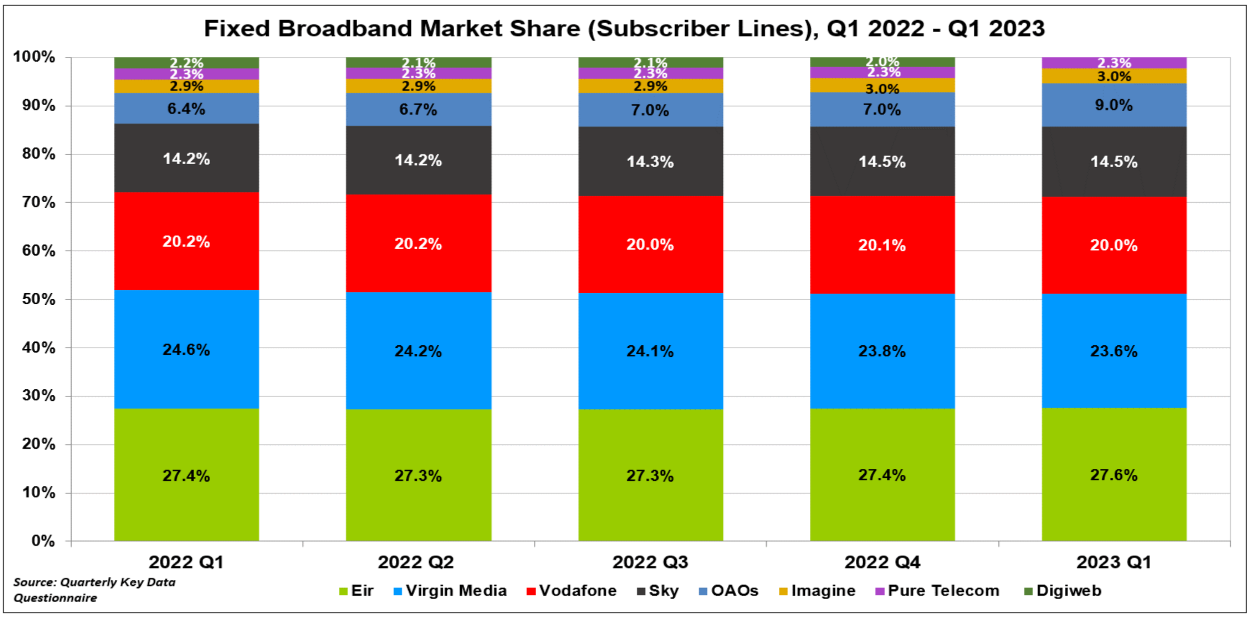
At the end of March 2023, there were 1.96 million active broadband subscriber lines in Ireland. This is -0.5% decrease from the previous quarter and a 0.8% increase on Q1 2022.

Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q1 2023	Quarterly Change Q4’22 – Q1’23	Annual Change Q1’22 – Q1’23
Cable Broadband	365,589	-0.7%	-2.8%
DSL Broadband	109,457	-6.6%	-21.6%
VDSL Broadband	513,916	-4.3%	-12.3%
FTTP Broadband	537,244	7.3%	34.8%
Satellite Broadband	4,648	18.4%	179.2%
FWA Broadband	86,991	3.1%	4.6%
Total Fixed Broadband	1,617,845	0.4%	1.9%
Mobile Broadband	339,293	-4.4%	-4.0%
Total Broadband	**1,957,138**	**-0.5%**	**0.8%**

- Lines for FTTP (+7.3%), FWA (+3.1%) and Satellite (+18.4%) showed positive growth this quarter. VDSL (-4.3%), DSL (-6.6%), Cable (-0.7%) and Mobile Broadband (-4.4%) subscriber lines all fell this quarter.

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



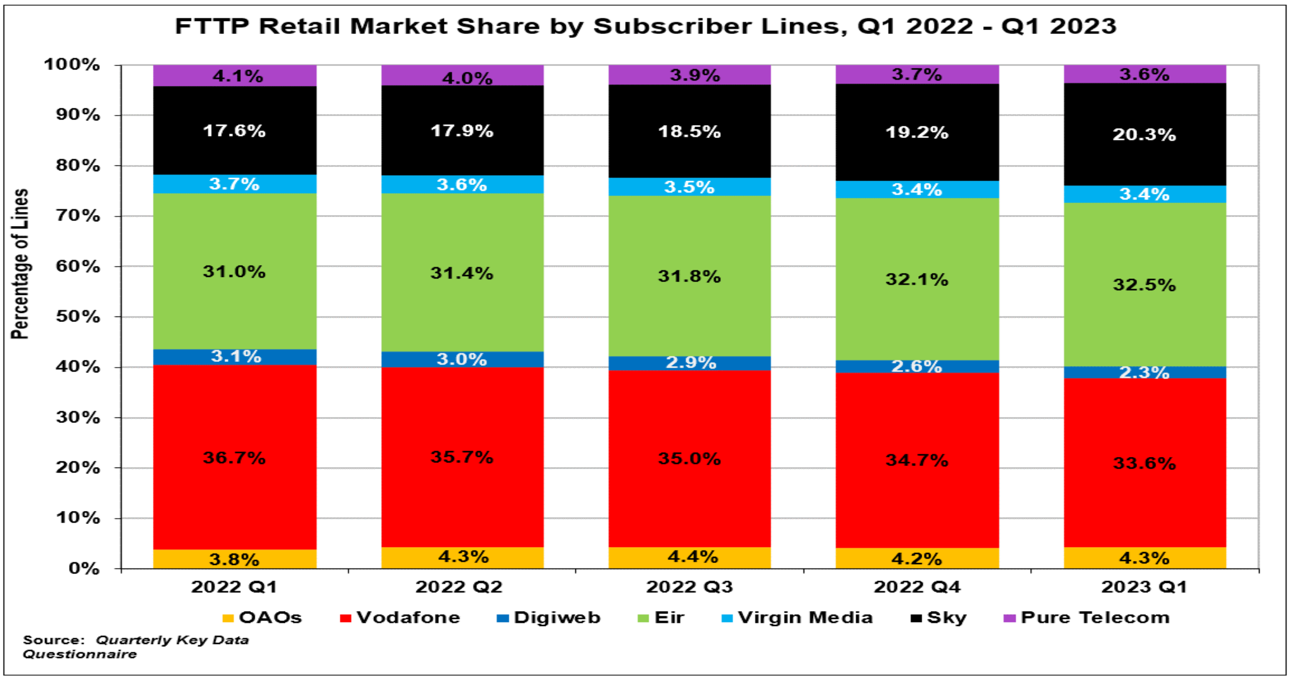
- In Q1 2023, Eir had 27.6% of total retail fixed broadband subscriber lines, followed by Virgin Media who had 23.6% of lines. Vodafone had 20.0% (excluding mobile broadband), Sky Ireland 14.5%, Imagine 3.0%, Pure Telecom 2.3%.
- All other OAOs combined accounted for the remaining 9.0% share of retail fixed broadband subscriber lines.

Table 3 - Retail Fixed Broadband Subscriber Lines by Sold Download Speed

Fixed Broadband Subscriber Lines by Sold Speed	Q1 2023	Q4 2022	Quarterly Change
<2Mbps - 9.99Mbps	4.1%	4.4%	-0.3%
=10Mbps - 29.99Mbps	5.9%	6.3%	-0.4%
=30Mbps - 99.99Mbps	30.9%	32.2%	-1.3%
=100Mbps - 499.99Mbps	24.9%	25.9%	-1.0%
=500Mbps - 999.99Mbps	25.3%	22.8%	+2.5%
>=1GB	8.9%	8.4%	+0.5%

- 59% of all fixed broadband subscriber lines had sold speeds which were equal to or greater than 100Mbps in Q1 2023.

Figure 4 - FTTP Subscriber Line Market Share

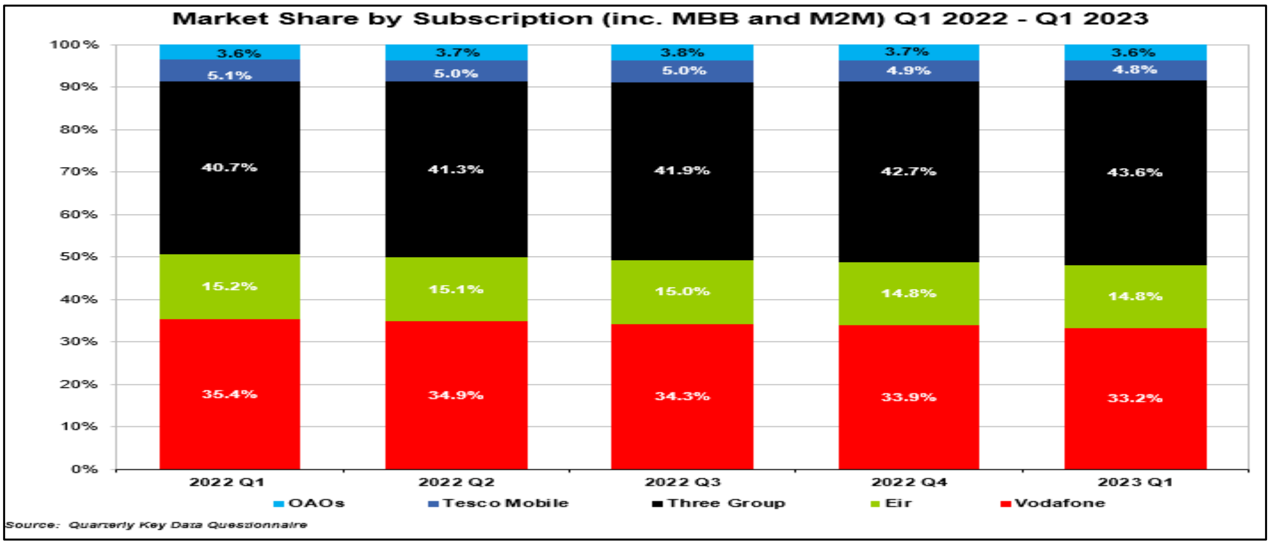


- In Q1 2023, Vodafone had 33.6% of retail FTTP subscriber lines, followed by Eir at 32.5%, Sky Ireland at 20.3%, Pure Telecom at 3.6%, Virgin Media at 3.4%, and Digiweb at 2.3% market share. OAOs accounted for the remaining 4.3%.

6 Mobile Market

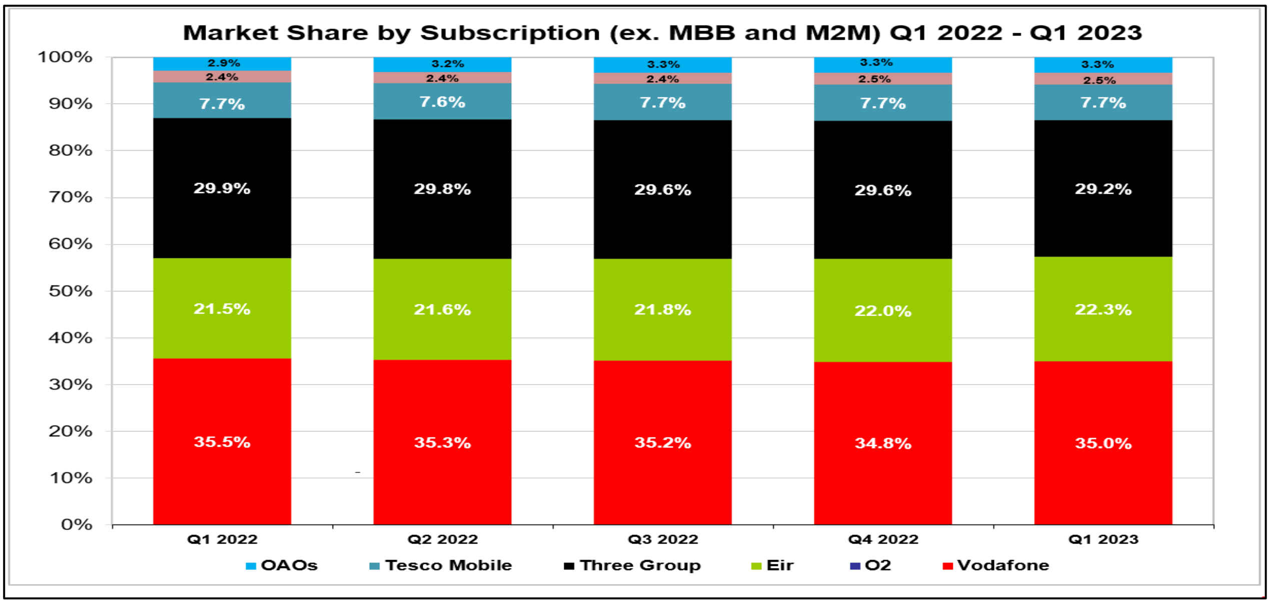
At the end of Q1 2023 there were 9,067,419 mobile subscriptions in Ireland, including mobile broadband (‘MBB’) and Machine to Machine (‘M2M’). If mobile broadband subscriptions (339,293) and M2M subscriptions (3,056,326) are excluded, the total number of mobile subscriptions was 5,671,800.

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



- In Q1 2023 Three had the largest share of mobile subscriptions including MBB and M2M at 43.6%. This was followed by Vodafone with 33.2%, Eir with 14.8%, Tesco Mobile at 4.8% and OAOs at 3.6%.
- In Q1 2023 Vodafone had the highest market share excluding mobile broadband and M2M (35.0%), followed by Three (29.2%), Eir (22.3%), Tesco Mobile (7.7%), Virgin Mobile (2.5%) and OAOs (3.3%).
- There were 1,745,976 2G, 1,266,709 3G, 4,926,874 4G and 1,127,860 5G mobile subscriptions in Q1 2023.

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



7 Corrigendum to Q1 2023

Note 1: Vodafone mobile revised M2M subscriptions and 2G subscriptions by 33.5k for Q4 2022.

Note 2: Vodafone mobile minutes are estimated for Q1 2023 due to system issues.

Note 3: Vodafone's mobile broadband subscriptions have decreased by 18k in Q1 2023 due to the inclusion of inactive subscriptions historically. This is being investigated and historical figures are under review.

Note 4: Westnet has revised its reported speeds for Q2 2022 – Q4 2022.

Note 5: There is a new methodology for Fixed Voice lines. Fixed voice subscriber lines are collected instead of subscriptions leading to a slight increase as one subscription can have more than one associated line.

Note 6: There is a new methodology for reporting on Fixed Voice call minutes. The methodology is under review as the call minutes have decreased more than expected so for Q1 2023 an estimate has been used.

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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