An Coimisiún um Rialáil Cumarsáide
Commission for Communications Regulation

Date: 15/09/2020

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q2 2020

QKDR DATA PORTAL

Access the latest statistical information on Electronic Communication Services

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

Reference: ComReg 20/82 (R)

An Coimisiún um Rialáil Cumarsáide
Commission for Communications Regulation
1 Dockland Central, Guild Street, Dublin 1, D01 E4X0, Ireland.
Telephone +353 1 804 9600. Fax +353 1 804 9680. Email info@comreg.ie |
Web www.comreg.ie

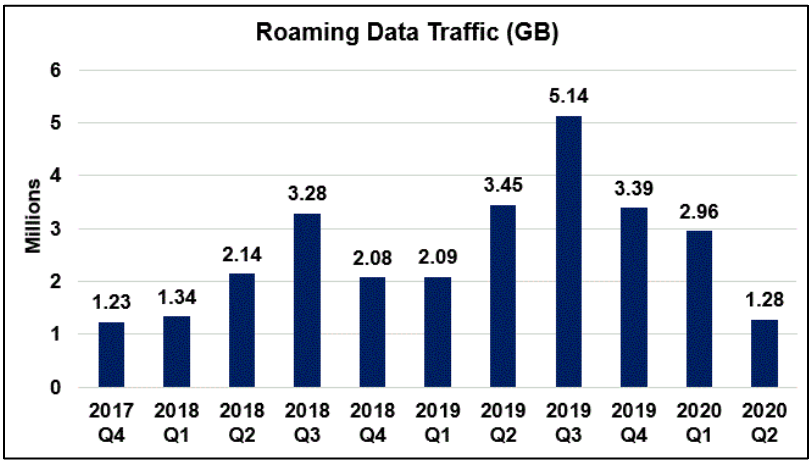
Q2 2020 Key Quarterly Trends

76% Yearly increase in fixed broadband traffic

12% Quarterly increase in voice traffic

201k Total FTTP broadband Subscriptions

1.5% Quarterly reduction in mobile retail revenues



- **Roaming data volumes reduced by 1.68 million GB in Q2 2020**
- **These are the lowest roaming data volumes recorded since Q4 2017**

VOB minutes increased by 21% QoQ

Domestic fixed to mobile minutes increased by 28% QoQ

Fixed broadband traffic increased by 19.6% 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 2020 to 30th June 2020. The report is based on submissions from 45 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

Overview of Irish Communications Market Q2 2020

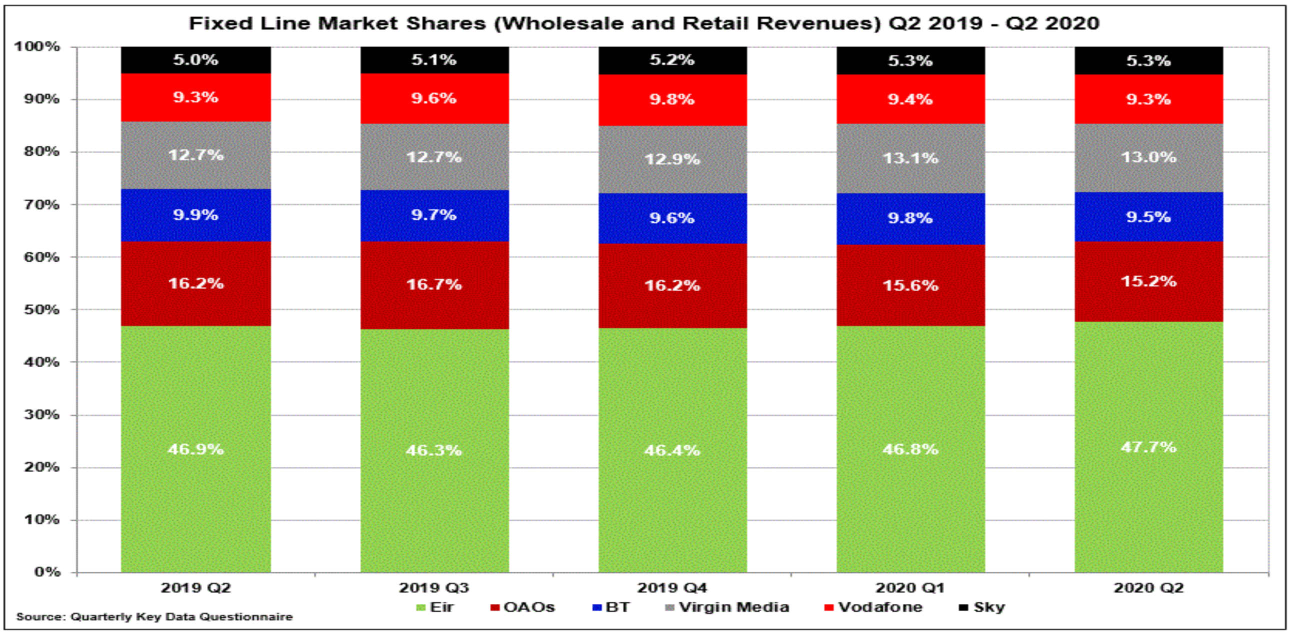
Table 1 - Communications Summary

Irish Quarterly Communications Market Data Q2 2020				
	Q2 2020	Q1 2020	Quarterly Change	Annual Change
Total Retail Market Revenues	€841,228,551	€864,819,599	-2.7%	-2.6%
Fixed Line Retail Revenues	€334,667,080	€332,576,335	0.6%	0.0%
Mobile Retail Revenues	€380,254,471	€385,960,264	-1.5%	-2.2%
Broadcasting Retail Revenues	€126,307,000	€146,283,000	-13.7%	-10.1%
Fixed Line Wholesale Revenues	€128,456,187	€132,397,657	-3.0%	0.5%
Mobile Wholesale Revenues	€38,466,000	€40,923,000	-6.0%	-13.5%
Total Voice Traffic (Minutes)	4,432,697,867	3,960,894,000	11.9%	15.5%
Fixed Voice Traffic (Minutes)	724,479,867	642,988,000	12.7%	17.5%
Mobile Voice Traffic (Minutes)	3,735,217,000	3,317,906,000	12.6%	19.4%
Fixed Broadband Subscriptions	1,494,217	1,476,709	1.2%	3.3%
Fixed Subscriptions	2,215,093	2,215,552	0.0%	-0.4%
Fixed Voice Subscriptions	1,375,126	1,386,305	-0.8%	-4.1%
Total Mobile Subscriptions	6,738,457	6,737,414	0.02%	5.0%
Machine to Machine Subscriptions	1,353,232	1,295,598	4.4%	21.7%
Mobile Broadband Subscriptions	317,975	320,563	-0.8%	4.7%
Mobile Voice Subscriptions	5,067,250	5,121,253	-1.1%	1.3%
Total Mobile Data Volumes	181,404	176,970	2.5%	42.8%

Fixed Market

- In Q2 2020, Eir had the highest revenue share in the fixed market with a 47.7% market share.
- ComReg estimates that the next four largest operators (BT Ireland, Sky Ireland, Virgin Media Ireland and Vodafone (fixed only)) contribute a further 37.1% share of total (retail and wholesale) industry revenue, while Other Authorised Operators (OAOs) account for the remaining 15.2% share.

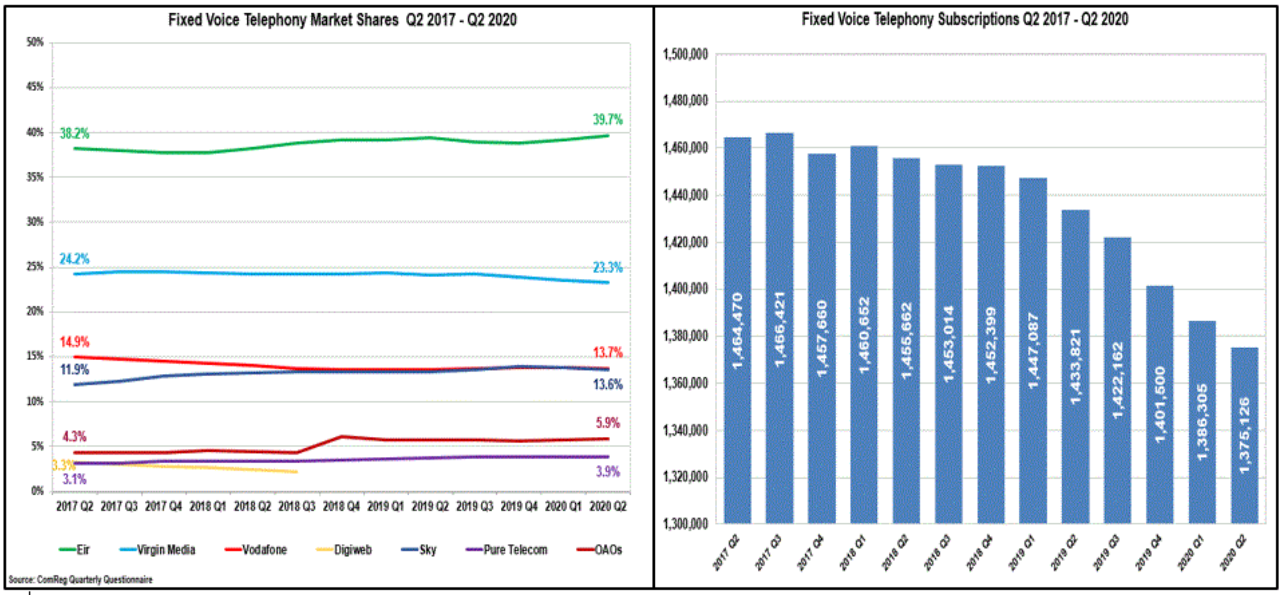
Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Fixed voice traffic in Q2 2020 was over 724 million minutes, which was a 12.7% increase on Q1 2020 and an increase of 17.5% since Q2 2019. Managed voice over broadband (VoB) minutes account for approximately 23.2% of total fixed voice minutes, up from 20.3% in Q2 2019.

Figure 2 – Retail Fixed Voice Subscriptions



- At the end of Q2 2020 there were 1,375,126 fixed voice subscriptions (a decrease of 0.8% since Q1 2020 and a decrease of 4.1% on Q2 2019).
- As of Q2 2020 Eir had 39.7% of all fixed voice subscriptions followed by Virgin Media (23.3%), Vodafone (13.7%), Sky (13.6%) and Pure Telecom (3.9%). OAOs accounted for the remaining 5.9% of fixed voice subscriptions.

Retail Broadband Market

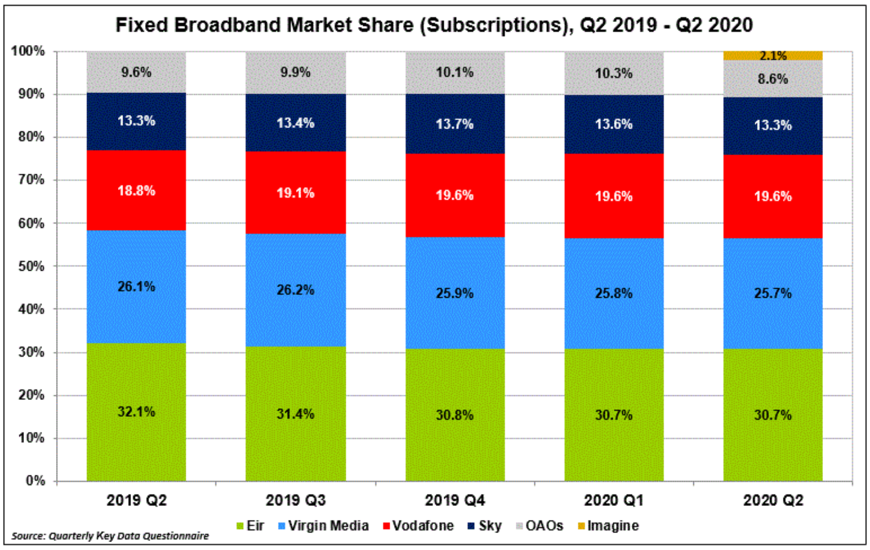
At the end of June 2020, there were 1.812 million active broadband subscriptions in Ireland. This was an increase of 0.8% on the previous quarter and a 3.6% increase on Q2 2019.

Table 2 - Total Number of Active Broadband Subscriptions

Subscription Type	Q2 2020	Quarterly Growth Q1'20 – Q2'20	Annual Growth Q2'19 – Q2'20
DSL Broadband	215,307	-5.4%	-19.6%
VDSL Broadband	643,965	0.8%	2.5%
Cable Broadband	374,326	0.4%	0.7%
FTTP Broadband	201,333	11.4%	58.8%
Satellite Broadband	3,087	-5.5%	-23.5%
FWA Broadband	56,399	5.9%	19.9%
Total Fixed Broadband	1,494,217	1.2%	3.4%
Mobile Broadband	317,975	-0.8%	4.7%
Total Broadband	**1,812,192**	**0.8%**	**3.6%**

- Subscriptions for VDSL (+0.8%), FTTP (+11.4%), Cable (+0.4%)and FWA (+5.9%) showed positive growth this quarter. Mobile Broadband (-0.8%), DSL (-5.4%) and satellite (-5.5%) subscriptions both fell this quarter.

Figure 3 – Retail Fixed Broadband Market Shares based on Subscriptions



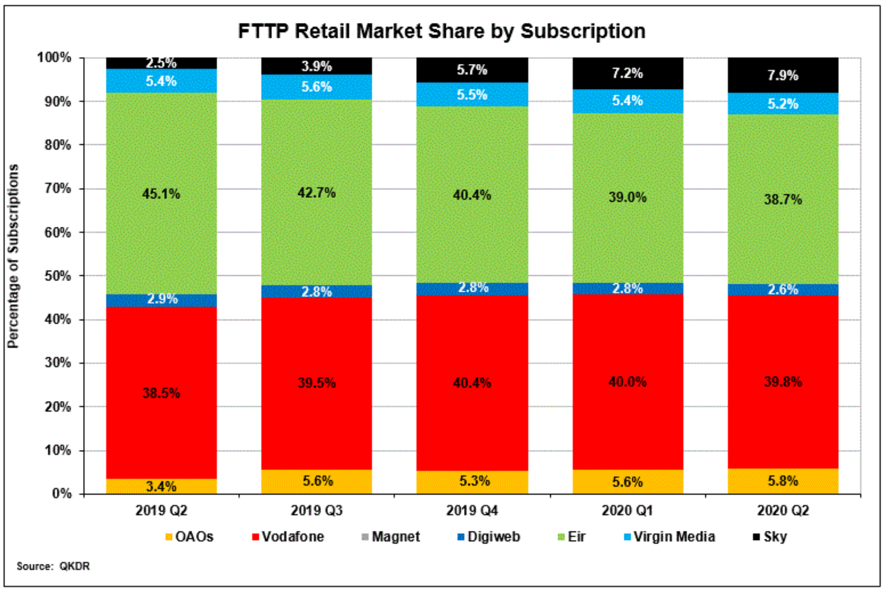
- In Q2 2020, Eir had 30.7% of total retail fixed broadband subscriptions, followed by Virgin Media who had 25.7% of subscriptions. Vodafone had 19.6% (excluding mobile broadband subscriptions), while Sky Ireland and Imagine had had a 13.3% and 2.1% market share respectively.
- All other OAOs combined accounted for the remaining 8.6% share of retail fixed broadband subscriptions.

Table 3 - Retail Fixed Broadband Subscriptions by Sold Download Speed

Fixed Broadband Subscriptions by Sold Speed	Q2 2020	Q1 2020	Quarterly Change
<2Mbps	0.8%	0.8%	0.0%
2Mbps – 9.99Mbps	8.2%	8.5%	-0.3%
=10Mbps – 29.99bps	11.8%	11.1%	0.7%
=30Mbps – 99.99Mbps	39.8%	41.7%	-1.9%
>=100Mbps	39.4%	37.9%	1.5%

- 79.2% of all fixed broadband subscriptions were equal to or greater than 30Mbps in Q2 2020.

Figure 4 - FTTP Subscription Market Share

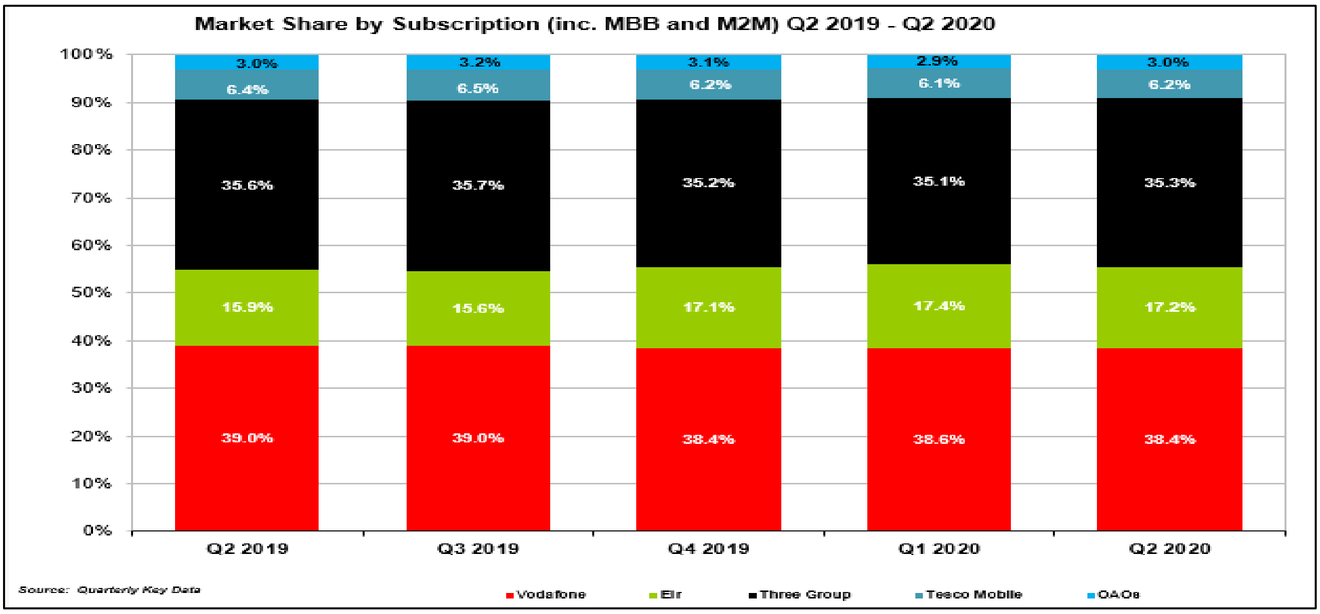


- In Q2 2020, Vodafone had 39.8% of retail FTTP subscriptions, followed by Eir at 38.7%, Virgin Media at 5.2%, Sky Ireland at 7.9% and Digiweb a 2.6% market share.
- OAOs combined accounted for the remaining 5.8% market share.

Mobile Market

At the end of Q2 2020 there were 6,738,457 mobile subscriptions in Ireland, including mobile broadband and Machine to Machine ('M2M'). If mobile broadband subscriptions (317,975) and M2M subscriptions (1,353,232) are excluded, the total number of mobile subscriptions was 5,067,250.

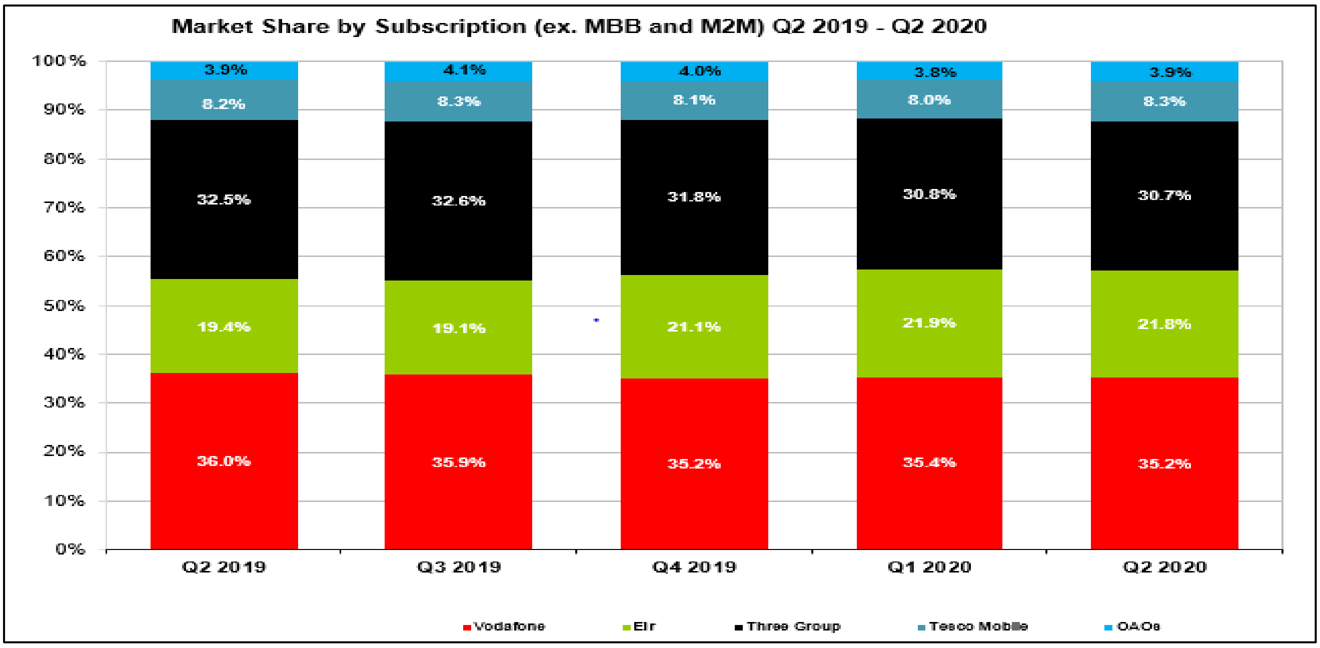
Figure 5 - Market Shares by Subscription including Mobile Broadband and Machine to Machine



- In Q2 2020 Vodafone had the largest share of mobile subscriptions including MBB and M2M at 38.4%, this was followed by Three with 35.3%, Eir with 17.2%, Tesco Mobile at 6.2% and OAOs at 3.0% of the market.

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

- In Q2 2020 Vodafone had the highest market share excluding mobile broadband and M2M (35.2%), followed by Three Group (30.7%), Eir (21.8%) and Tesco Mobile (8.3%).



Corrigendum to Q3 2018 QKDR – Q1 2020 QKDR

Note 1: Retail and Wholesale Revenue figures were revised from Q3 2018 to Q1 2010 following revisions from EU Networks Ireland Private Fibre Limited with these revisions ranging from -4.9 million to +6.4 million. Fixed Line Market Shares (by Retail Revenues), Fixed Line Market Shares (by Retail and Wholesale Revenues) and Total Fixed Revenues were impacted by these revisions.

Note 2: Mobile Retail Revenues were revised from Q1 2019 to Q1 2020 following implementation of International Financial Reporting Standard (IFRS) 15 'Revenue from Contracts with Customers'. This has resulted in changes to Total Mobile Revenues and Mobile Market Share by Revenue. Please note that due to this standard annual revenue should be considered when reviewing trends in mobile revenue.

Note 3: Fixed Retail Voice Traffic was revised for Q1 2020 following revisions from BT Ireland Communications Limited with these revisions totalling -33.4 million minutes. Total Fixed Voice Minutes were impacted by these revisions.

Note 4: Fixed Voice Revenue was revised for Q1 2020 following revisions from BT Ireland Communications Limited with these revisions totalling -€2.9 million. Fixed Line Market Shares (by Retail Revenues), Fixed Line Market Shares (by Retail and Wholesale Revenues), Fixed Voice Retail Revenues and Total Fixed Revenues were impacted by these revisions.

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) .