



Electronic communications and postal market trends Q1 2015 to Q3 2019

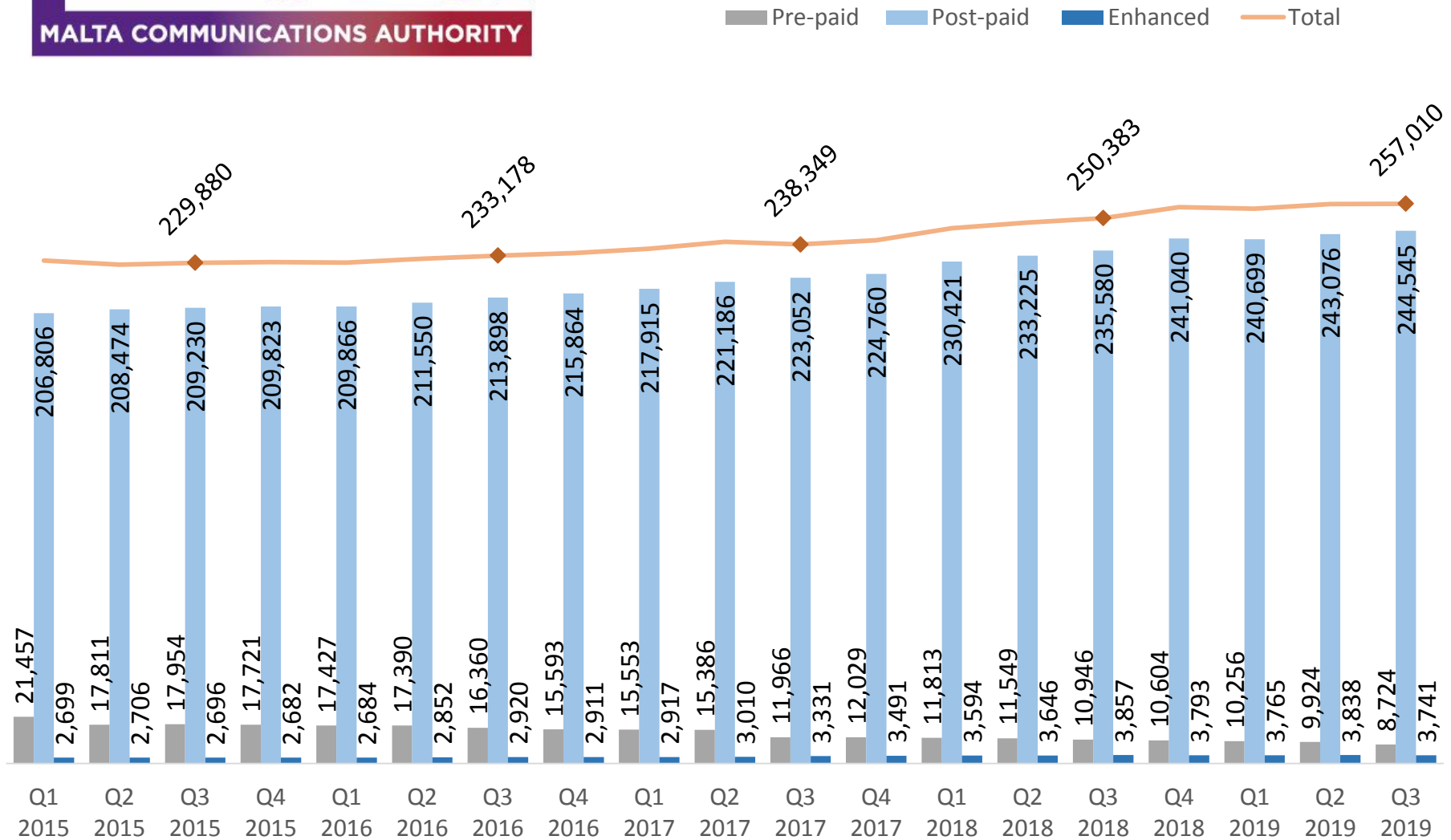
Figures based on the Data Report Sheet (DRS) publication of the 17th January 2020



Purpose

- Figures in this presentation are based on the latest Data Report Sheet (DRS) publication.
- Main indicators:
 - ✓ Number of subscriptions and ARPU for:
 - (i) fixed telephony; (ii) mobile telephony (iii) fixed broadband (iv) pay-TV;
 - ✓ Mobile data volumes consumed by mobile telephony subscribers;
 - ✓ Mail volumes for the postal sector.
- Data freeze carried out on the 3rd January 2020.

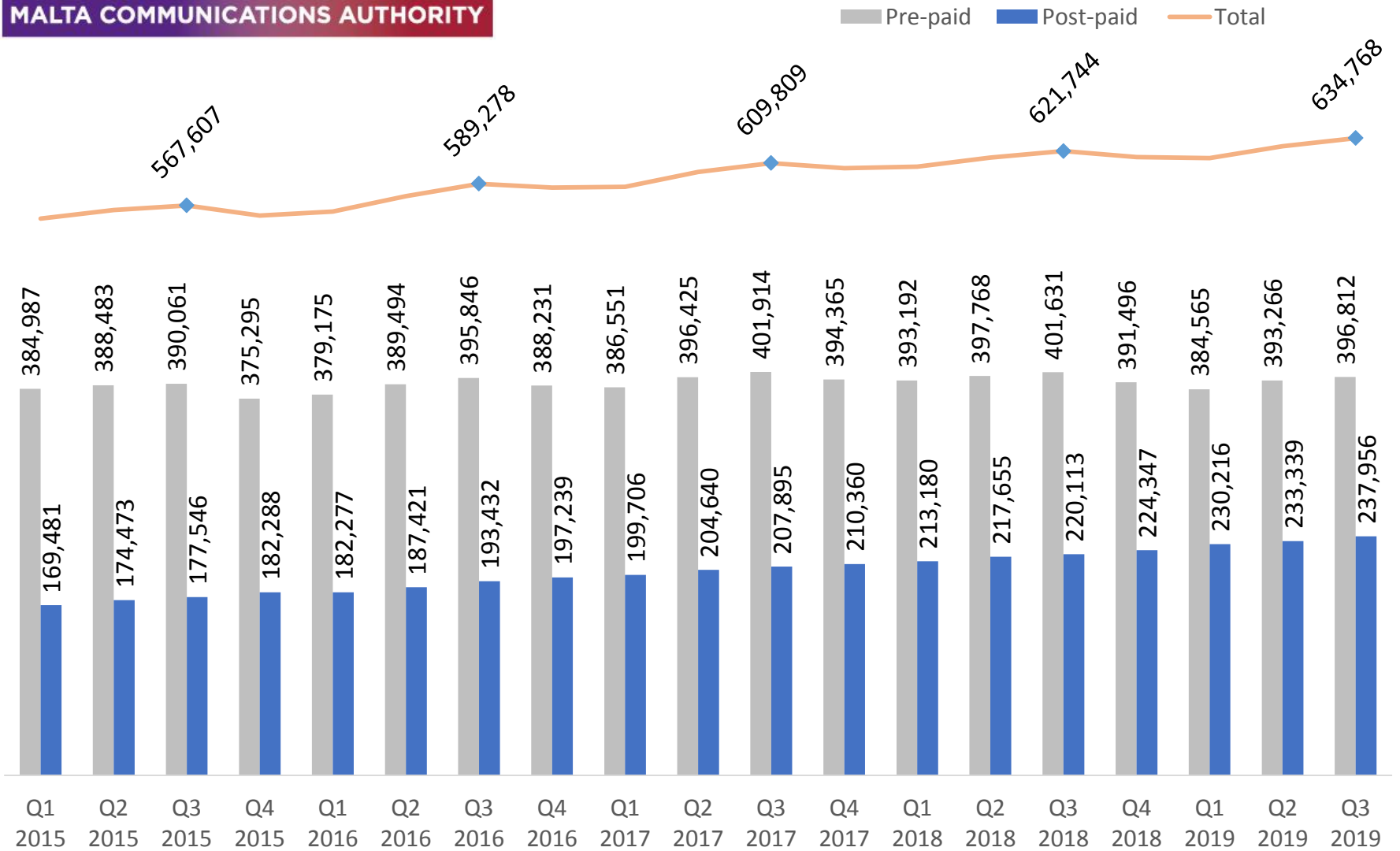
Fixed telephony – subscriptions as at end of period



Readers should note that 'enhanced' connections are connections which are considered to be non-standard including dual and multiple channel subscriptions typically used for business connections.

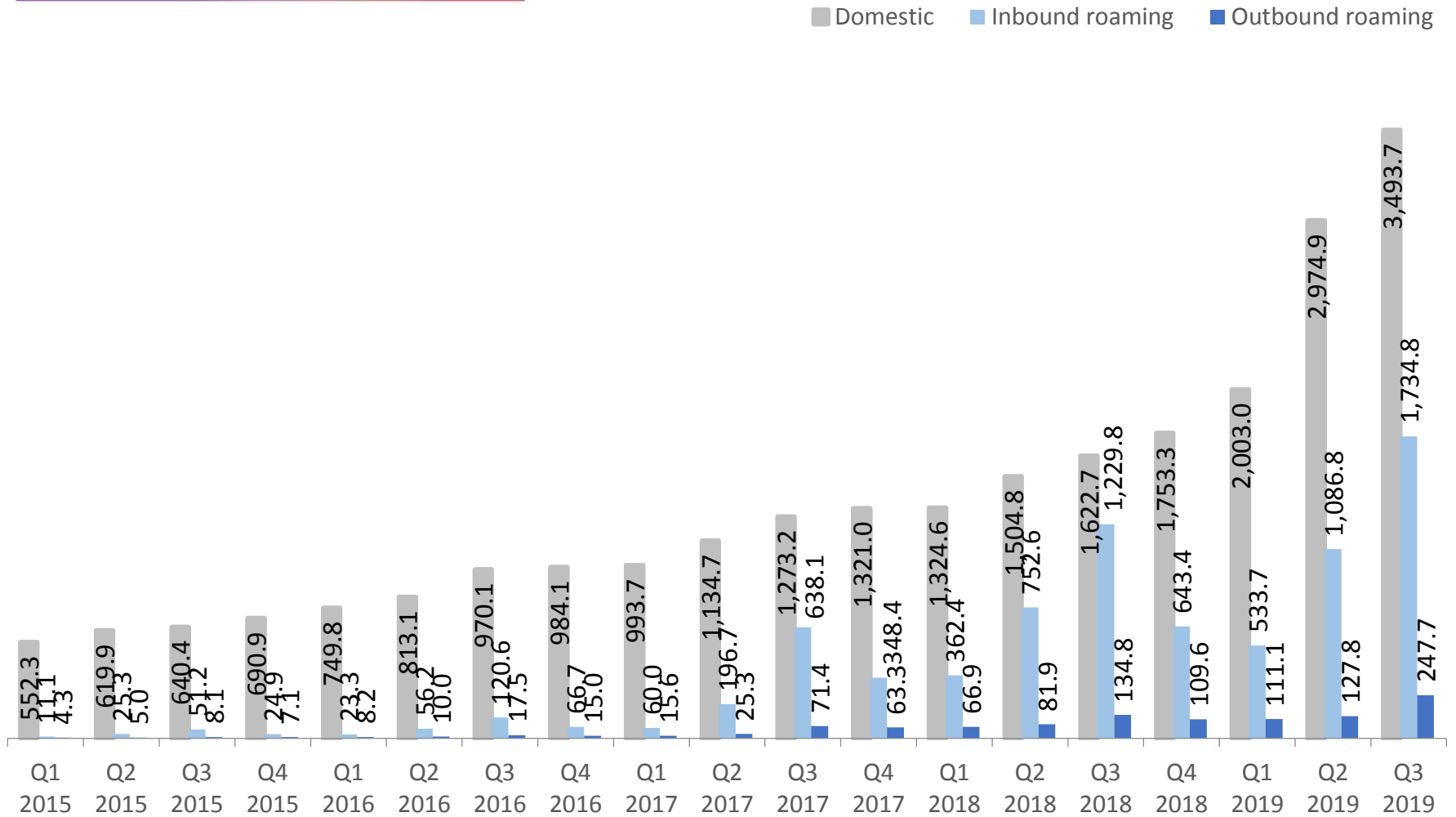


Mobile telephony – subscriptions as at end of period





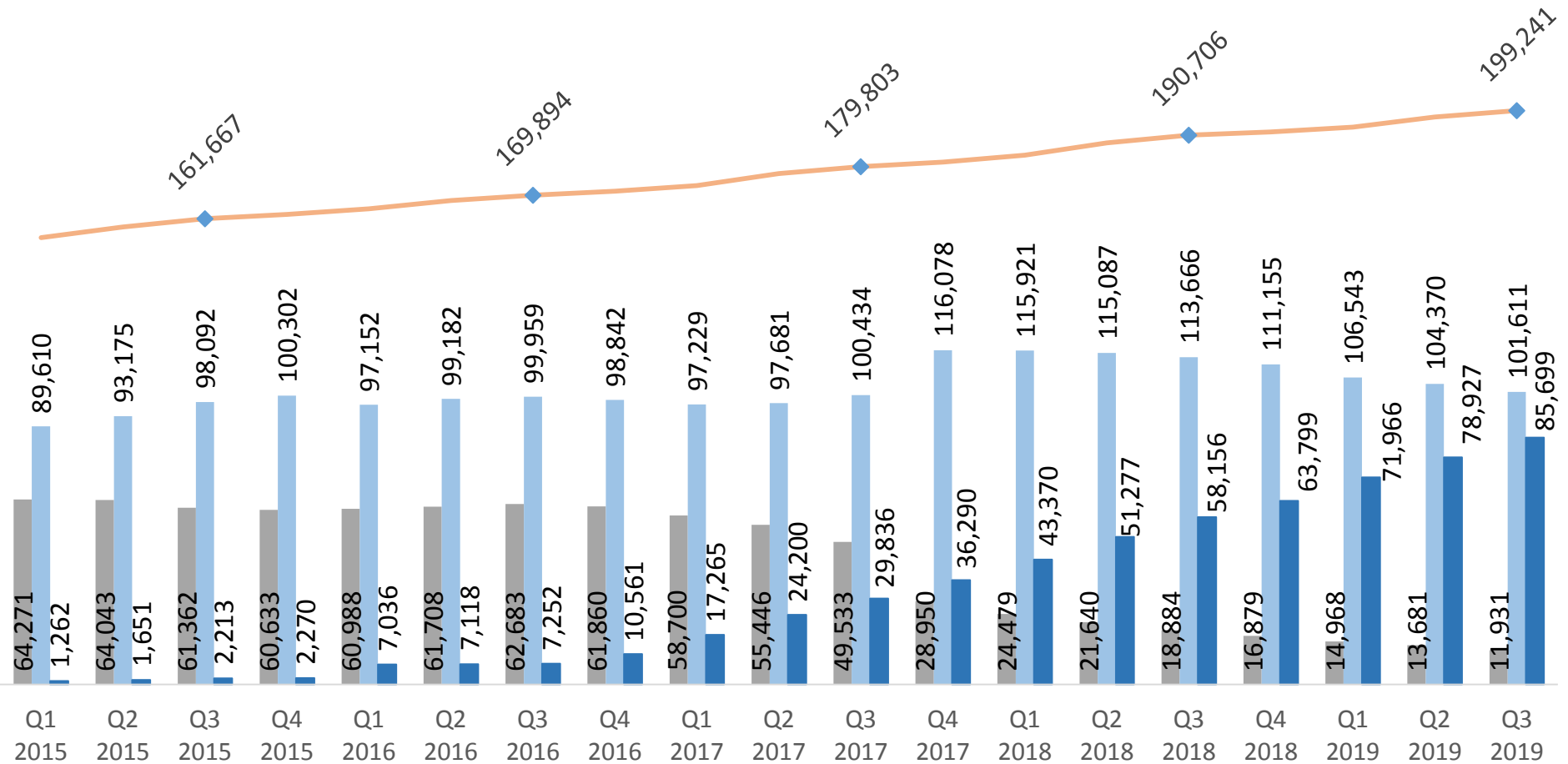
Mobile telephony – mobile data volumes (in million MBs)





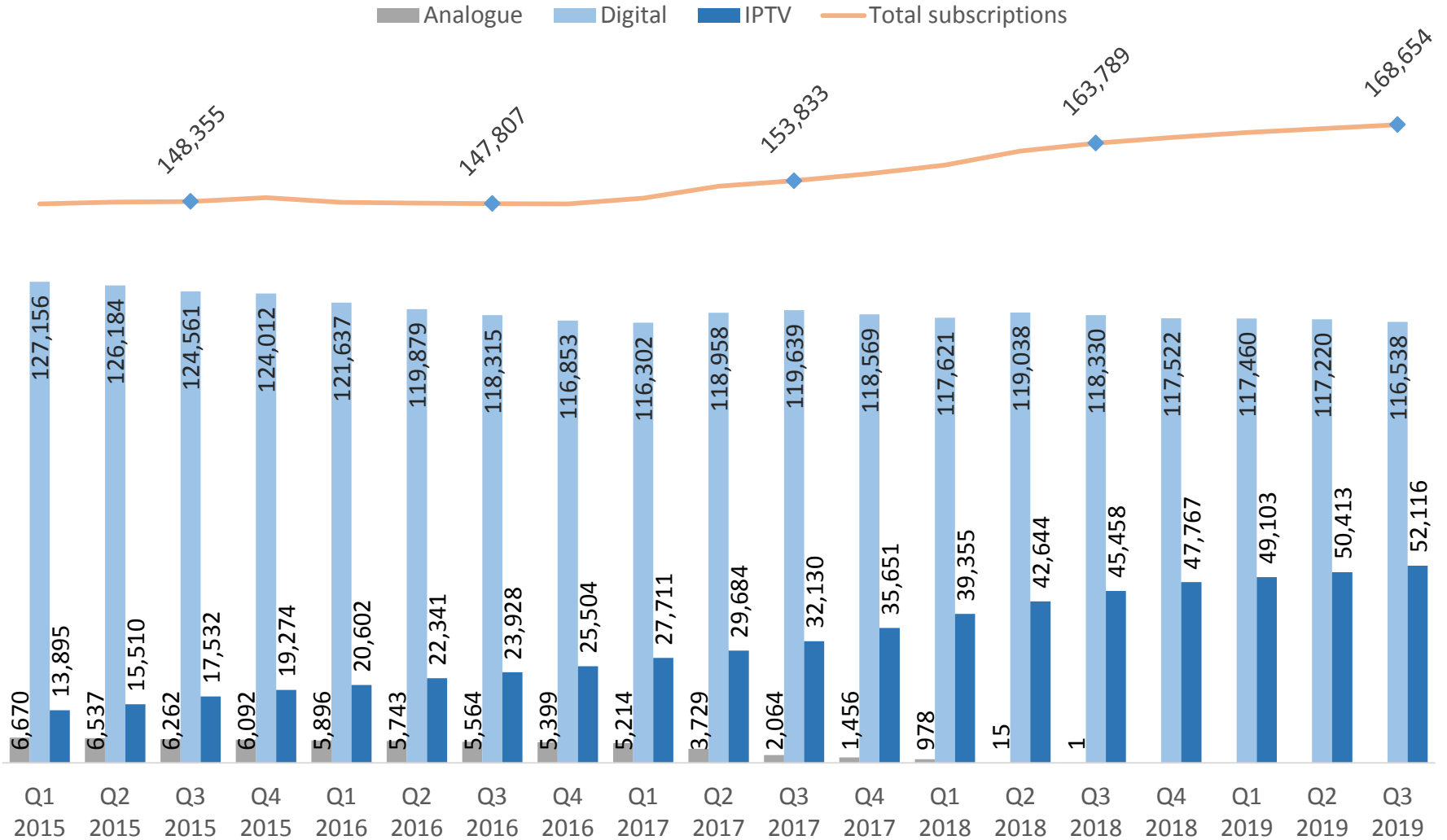
Fixed broadband – subscriptions as at end of period

<30Mbps
 ≥30Mbps but < 100Mbps
 ≥100Mbps
 Total





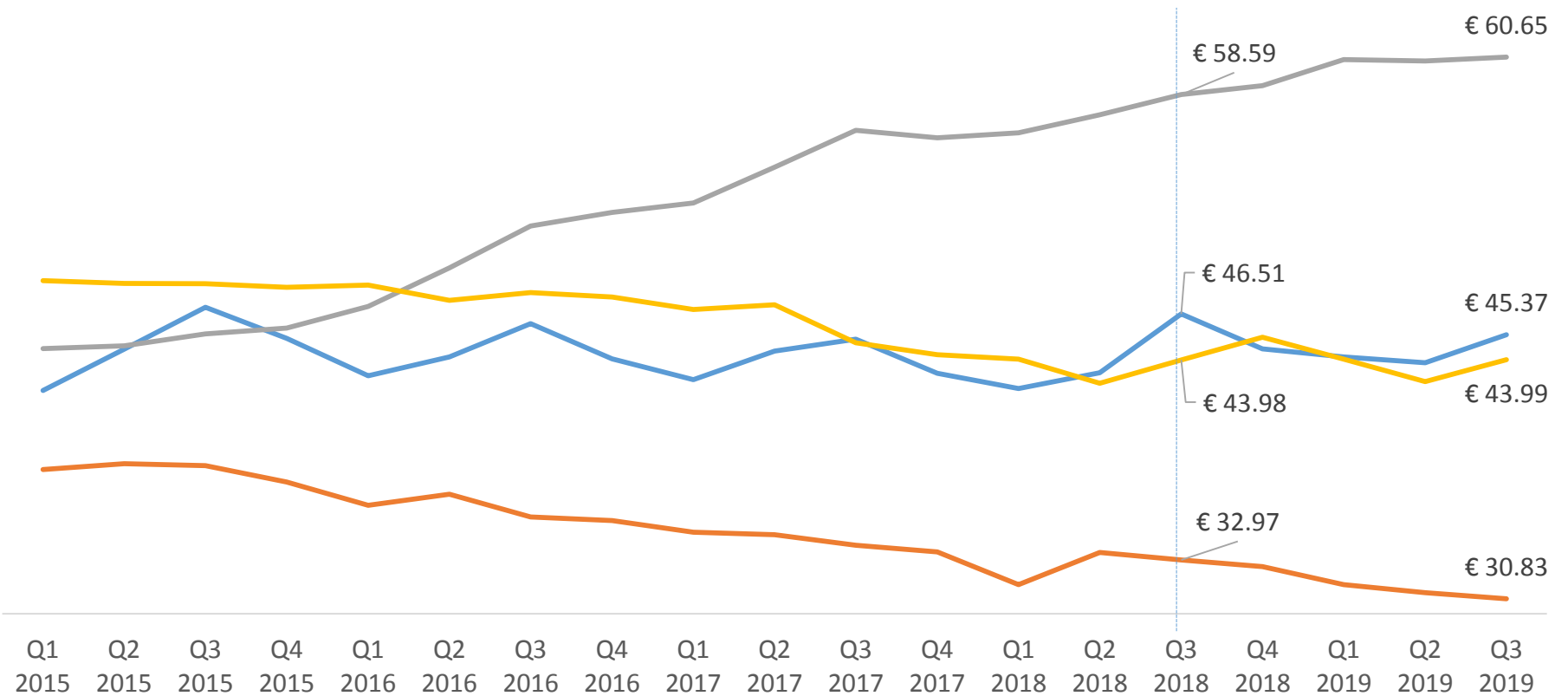
Pay-TV – subscriptions as at end of period





Average revenue per user (ARPU, €)

— Mobile telephony — Fixed line telephony — Fixed broadband — Pay-TV

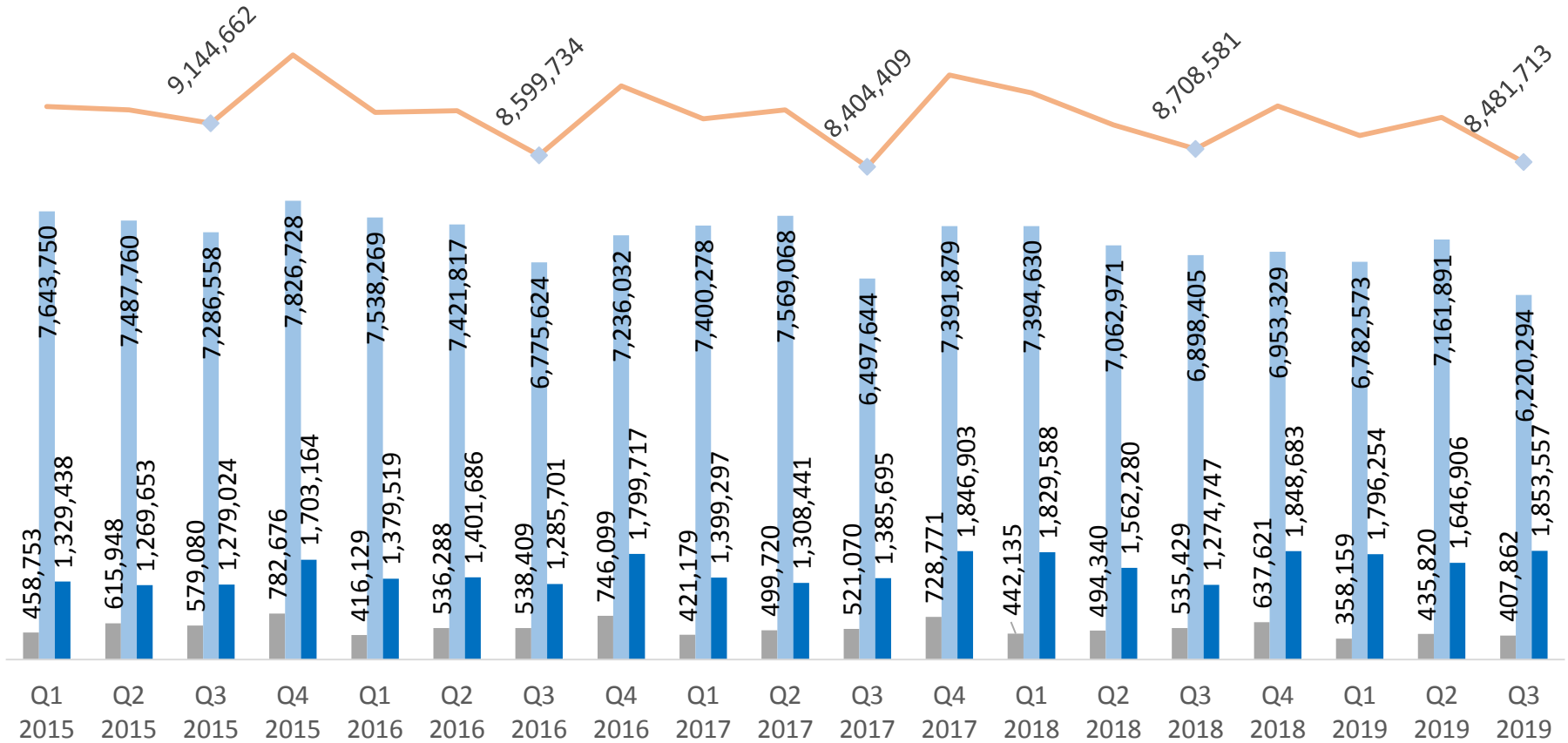


This indicator captures the average quarterly revenue per subscription reported by local service providers for each service. The revenue element for each individual service is composed of revenues from both stand-alone and bundle subscriptions to a specific service, but excludes installation and connection revenues. Readers should note that operators are left at their discretion to allocate their revenues to individual services.



Post – mail volumes

■ Outbound cross border mail items
 ■ Domestic mail items
 ■ Inbound cross border mail items
 — Postal mail volumes





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