



MCA Market Trends - Q1 2016 to Q3 2020

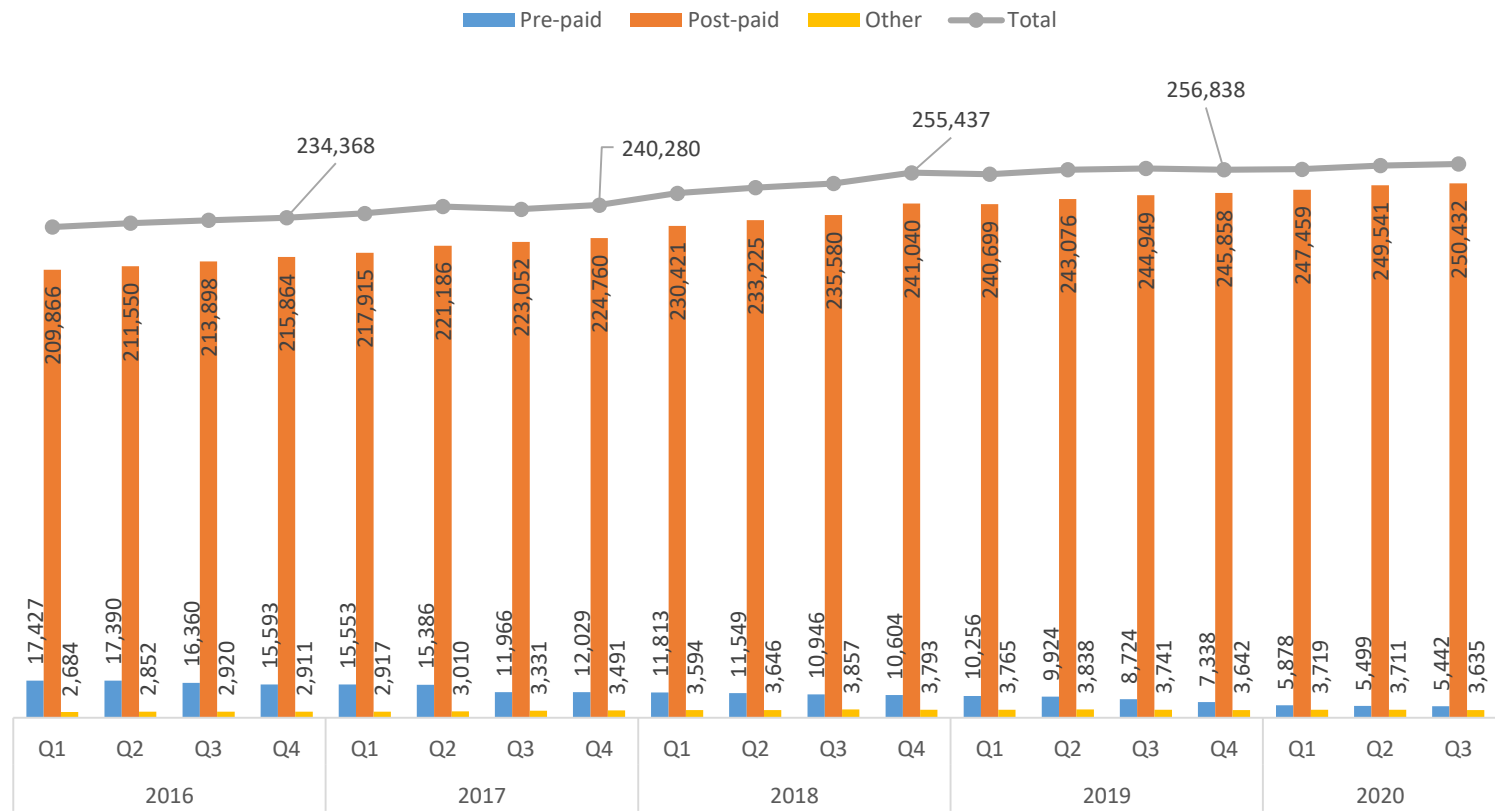
Figures based on the Data Report Sheet (DRS) publication of the 15th January 2021



Purpose

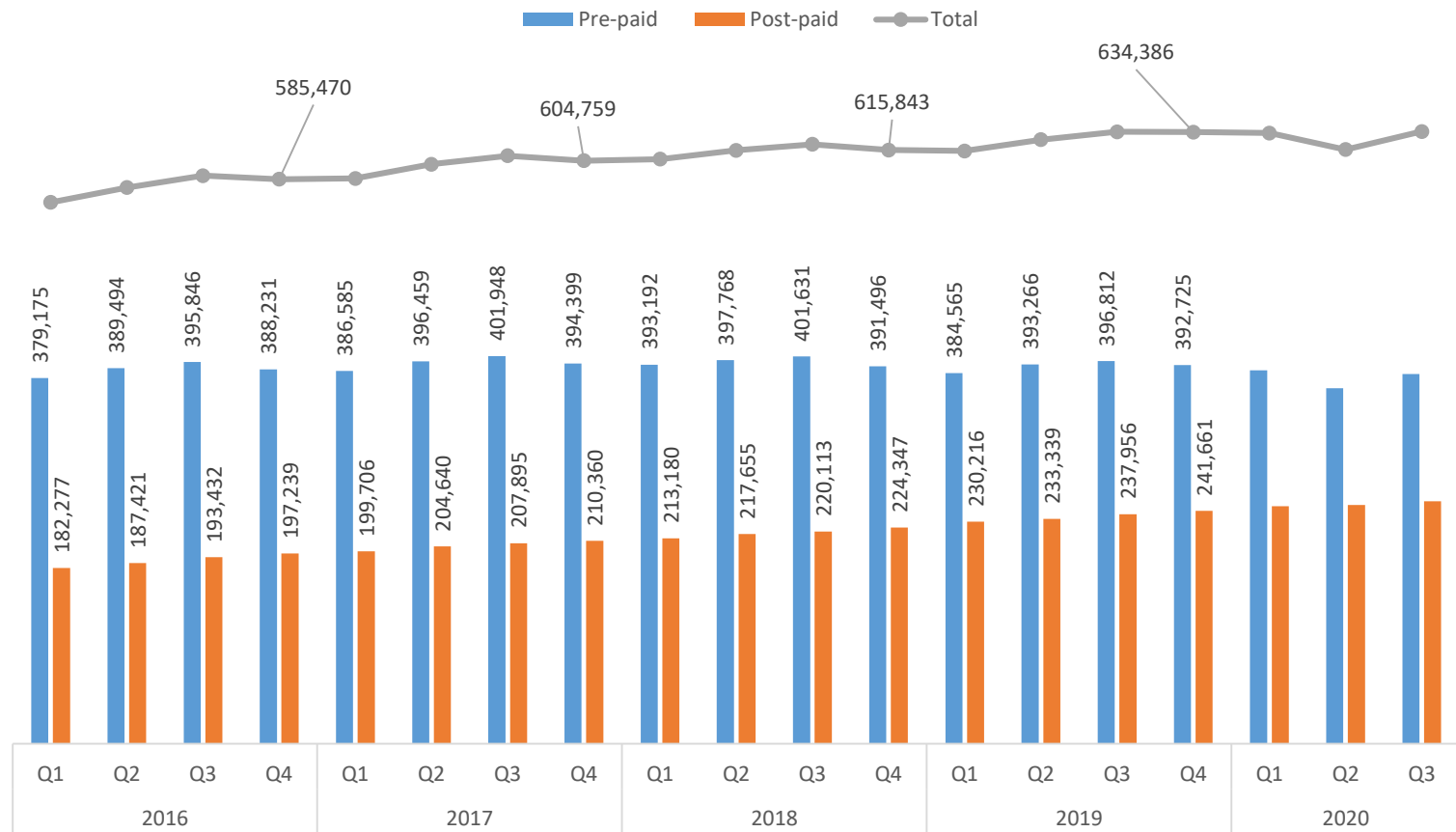
- Figures in this presentation are based on the latest Data Report Sheet (DRS) publication.
- Main indicators:
 - ✓ Number of subscriptions and ARPU for:
 - (i) fixed telephony; (ii) mobile telephony (iii) fixed broadband (iv) pay-TV;
 - ✓ Mobile data volumes consumed by mobile telephony subscribers;
 - ✓ Mail volumes for the postal sector.
- Data freeze carried out on the 23rd December 2020.

Fixed telephony – subscriptions as at end of period



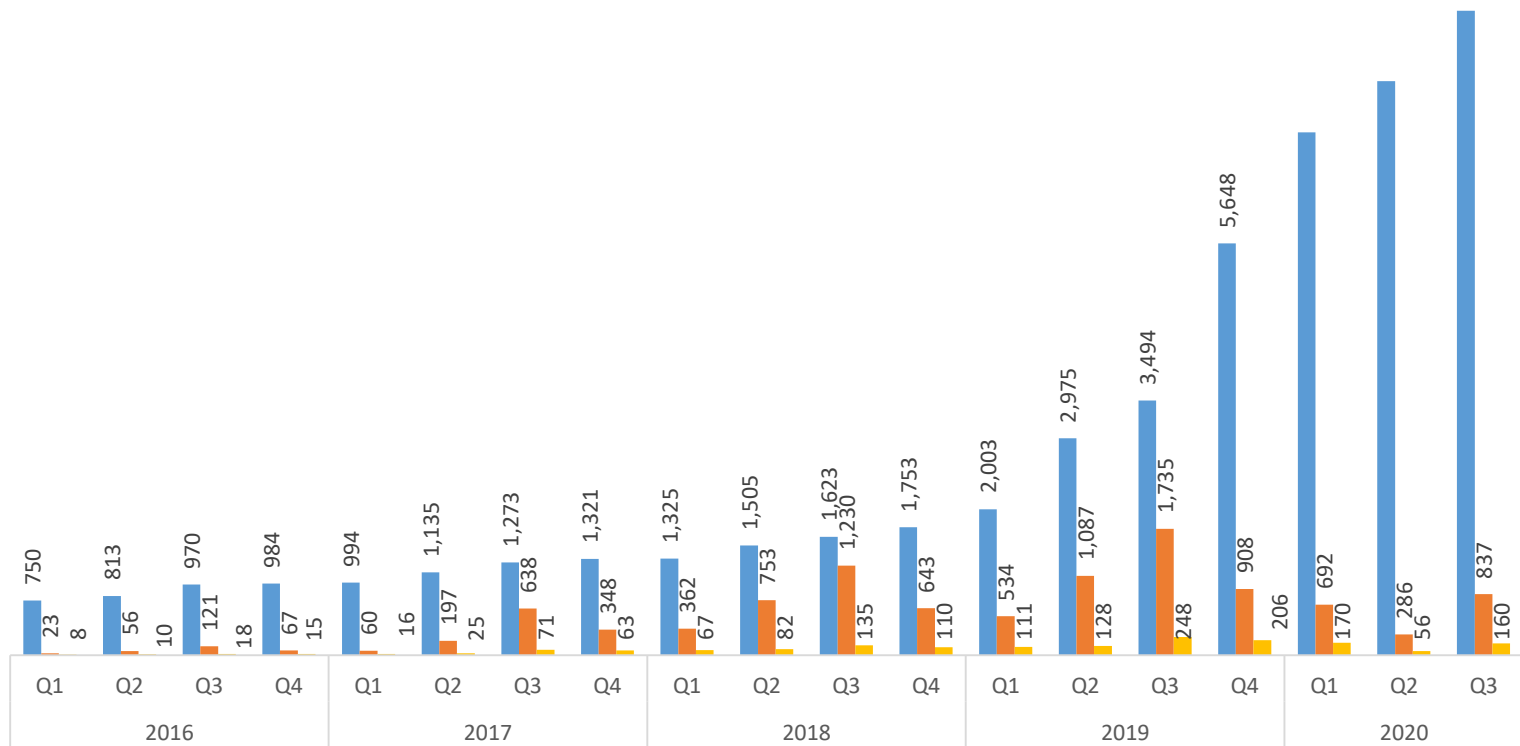
‘Other Subscriptions’ refer to subscriptions that are considered to be non-standard, such as ISDN connections and / or multi-channel connections.

Mobile telephony – subscriptions as at end of period

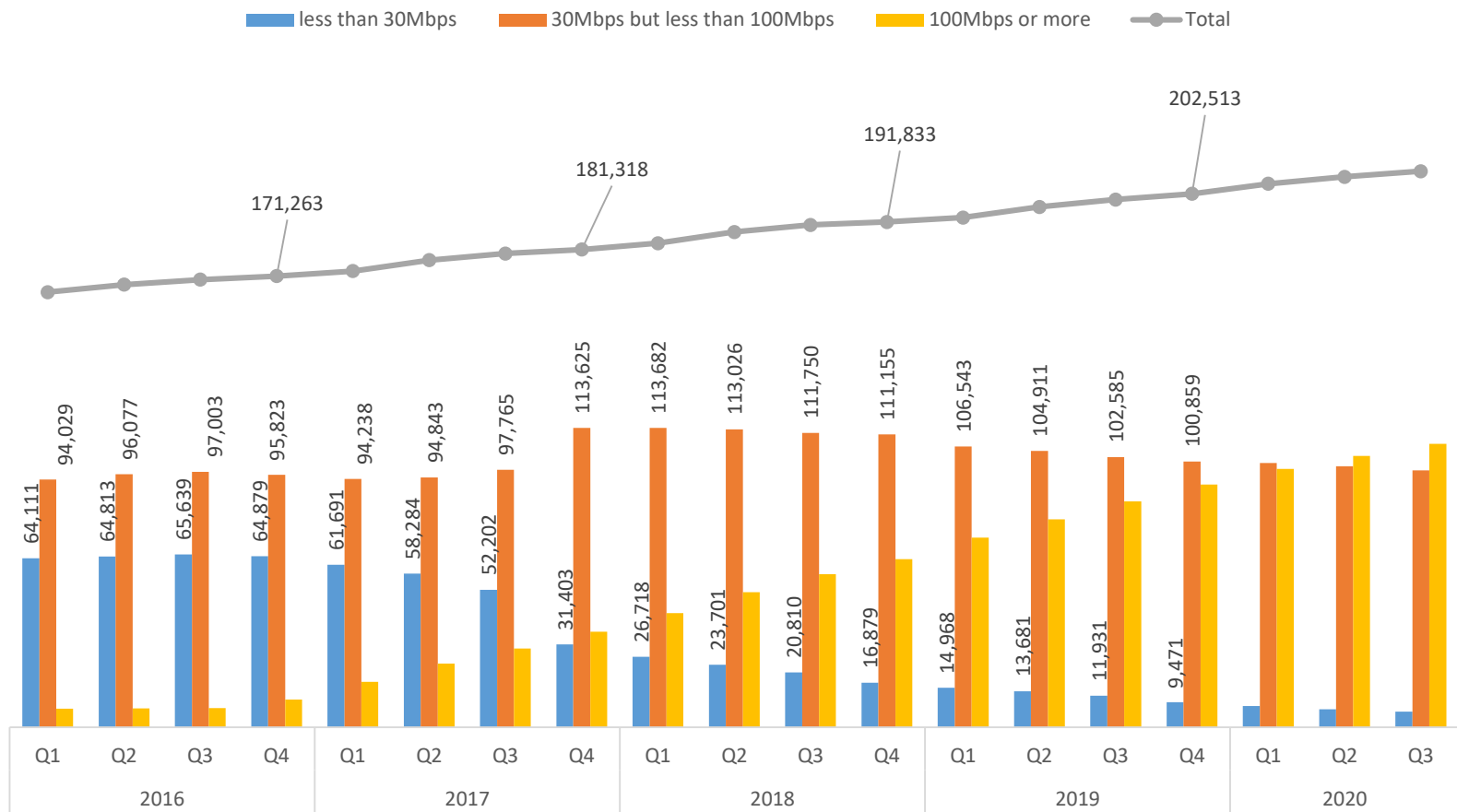


Mobile telephony – data volumes (in million MBs)

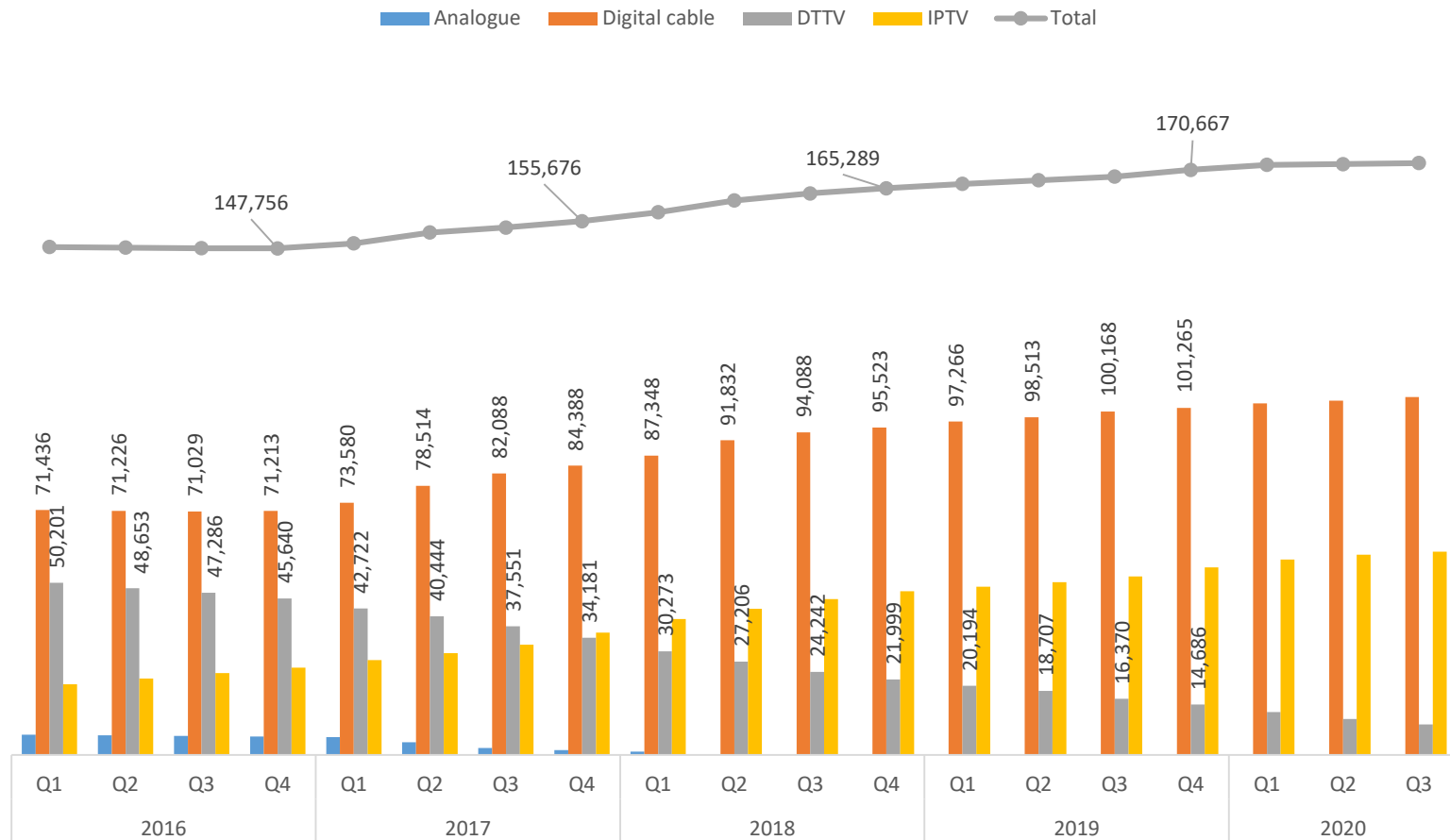
■ Domestic ■ Inbound roaming ■ Outbound roaming



Fixed broadband – subscriptions as at end of period



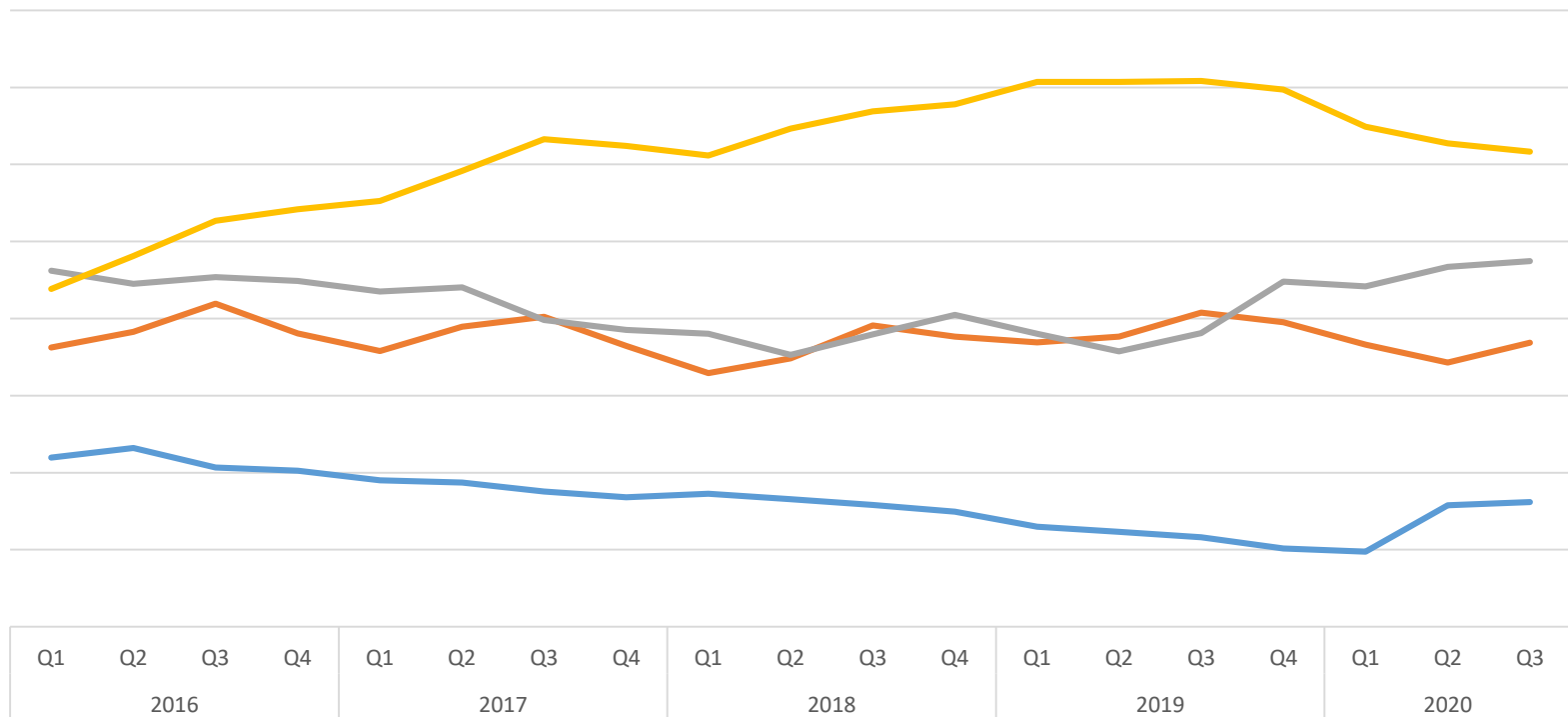
Pay-TV – subscriptions as at end of period





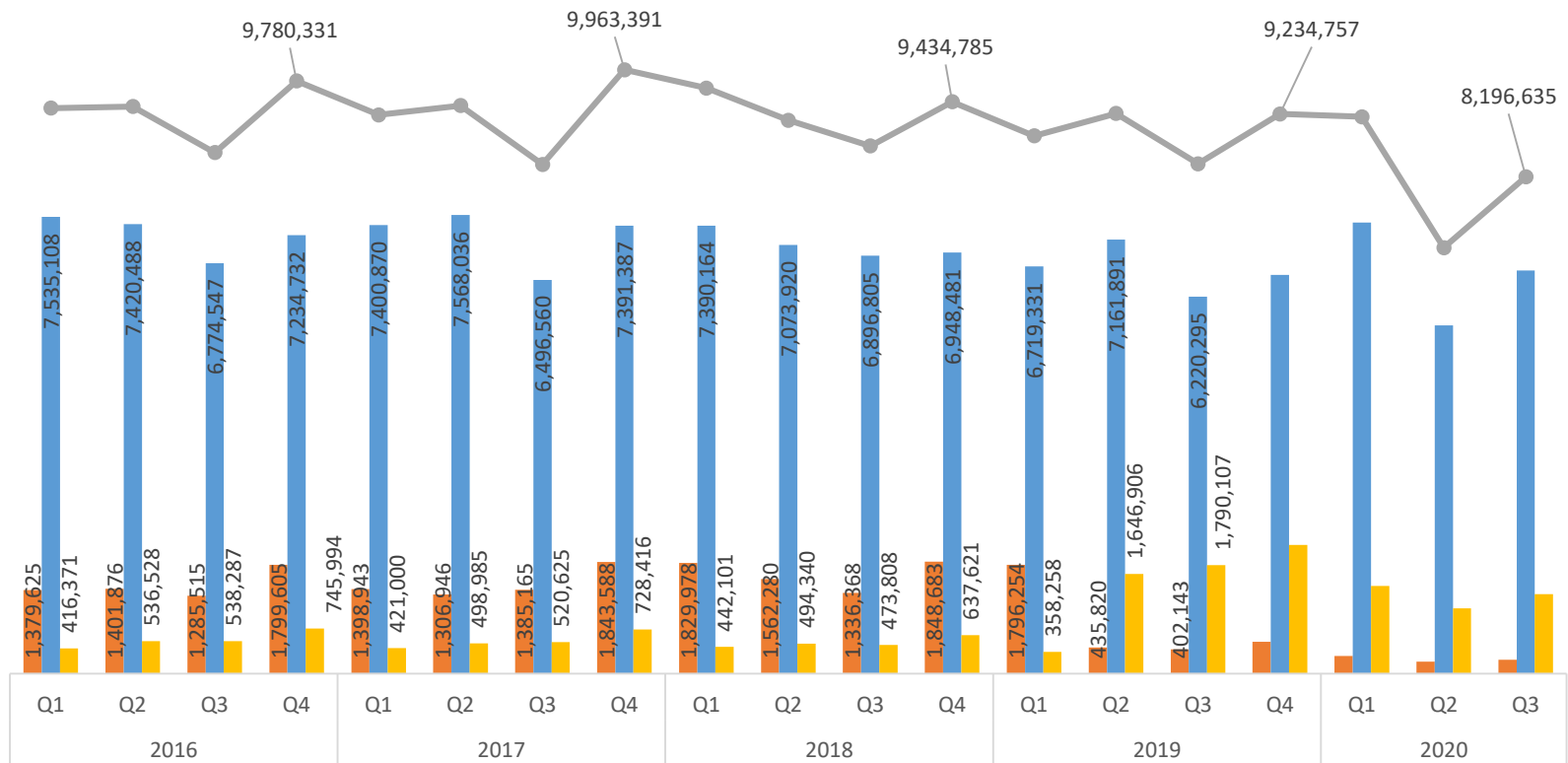
Average revenue per user (ARPU, €)

— Fixed telephony
 — Mobile telephony
 — Pay TV
 — Fixed broadband



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 both stand-alone and bundle revenues from 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. For fixed broadband, ARPU has been declining as from Q4 2019 possibly as a result of a change in the apportionment of bundle revenues by service in the bundle.

■ Inbound cross-border mail
 ■ Domestic mail
 ■ Outbound cross-border mail
 ● Total





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