

Autoriteit  
Consument & Markt



# Telecom Monitor

## Q3 – Q4 2019

### Report

This is the report of the Netherlands Authority for Consumers and Markets (ACM) with the market figures of the telecom sector.

Based on data from the most important market participants in the telecom industry, the Telecom Monitor gives an overview of the trends in mobile services, fixed telephony, broadband, television, business network services, and bundles. The largest market participants in the sector regularly provide ACM with information about their activities for the Telecom Monitor.

ACM verifies that data. In that way, ACM is able to keep track of the trends and developments in the various markets. The figures form a solid basis for ACM's three-year market analyses.

# Table of contents

	page
Trends	3
Annual figures	4
Mobile	10
Fixed telephony	18
Broadband	28
Business network services	40
Television	46
Bundles	52
Interviewed market participants	57

# Trends

## Third and fourth quarter 2019

### Mobile

In the Netherlands, consumption of mobile data using 4G networks was ten times as high in 2019 as it was five years before. More than 700 billion MB of 4G data was consumed in 2019, which is 650 billion MB more than in 2015. Consumption of 3G data over the past five years has remained stable, at approximately 50 billion MB per year.

The number of text messages has decreased by ten percent over the past five years. However, the Dutch have called fifteen percent more in 2019 than five years before. The increase in data consumption has already been going on for several years, and this trend has continued in 2019. In 2019, total consumption was 32 percent higher than in 2018. Compared with five years ago, the number of machine-to-machine (M2M) connections increased by 4 million, to 6.7 million connections. These connections include cars or devices (such as smoke detectors, alarm systems and smart energy meters) that exchange information, using an internet connection, with the digital systems of the operators of those devices.

### Broadband

More and more households have fast broadband connections. The percentage of households connected to the Internet at 30Mbps (Megabit per second) or higher was 91.7 percent in 2019. In 2015, this was just 65.5 percent. The percentage of households with connections of 30Mbps or lower was 8.3 percent in 2019, compared with 34.5 percent in 2015. By the end of 2019, almost half of all households had an internet connection of 100Mbps or higher.

### Bundling

More and more consumers take out bundles that combine mobile plans with fixed services, for example television + fixed telephony + broadband access + mobile plans. The number of fixed-mobile bundles has increased rapidly since 2015 from almost 500,000 connections in 2015 to 2.7 million by the end of 2019.

### Telecom providers

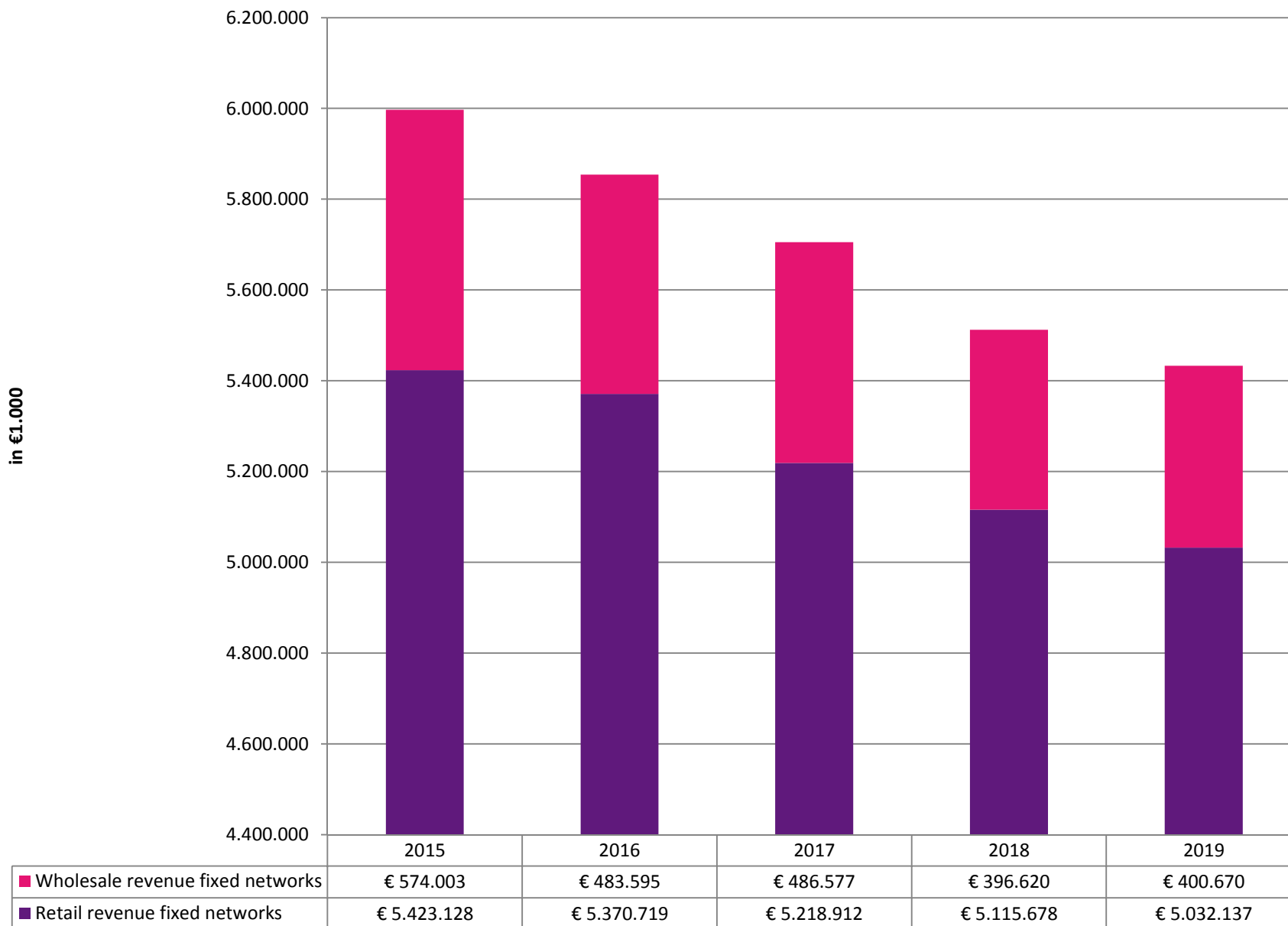
Based on mobile data consumption, the market share of mobile operator T-Mobile (including Tele2) was nearly half of all data in 2019. KPN's market share with regard to mobile-data consumption was between 25 and 30 percent, and VodafoneZiggo's market share was between 15 and 20 percent. The three largest providers in the Netherlands each have a market share of between 20 and 30 percent on the mobile-connections market.

### Other comments

We have combined the data for T-Mobile and Tele2 in this report. T-Mobile / Tele2 is now reported as T-Mobile. Caiway and DELTA have been moved from the category 'Other providers' and are now reported as DELTA Fiber Nederland.

# Annual figures

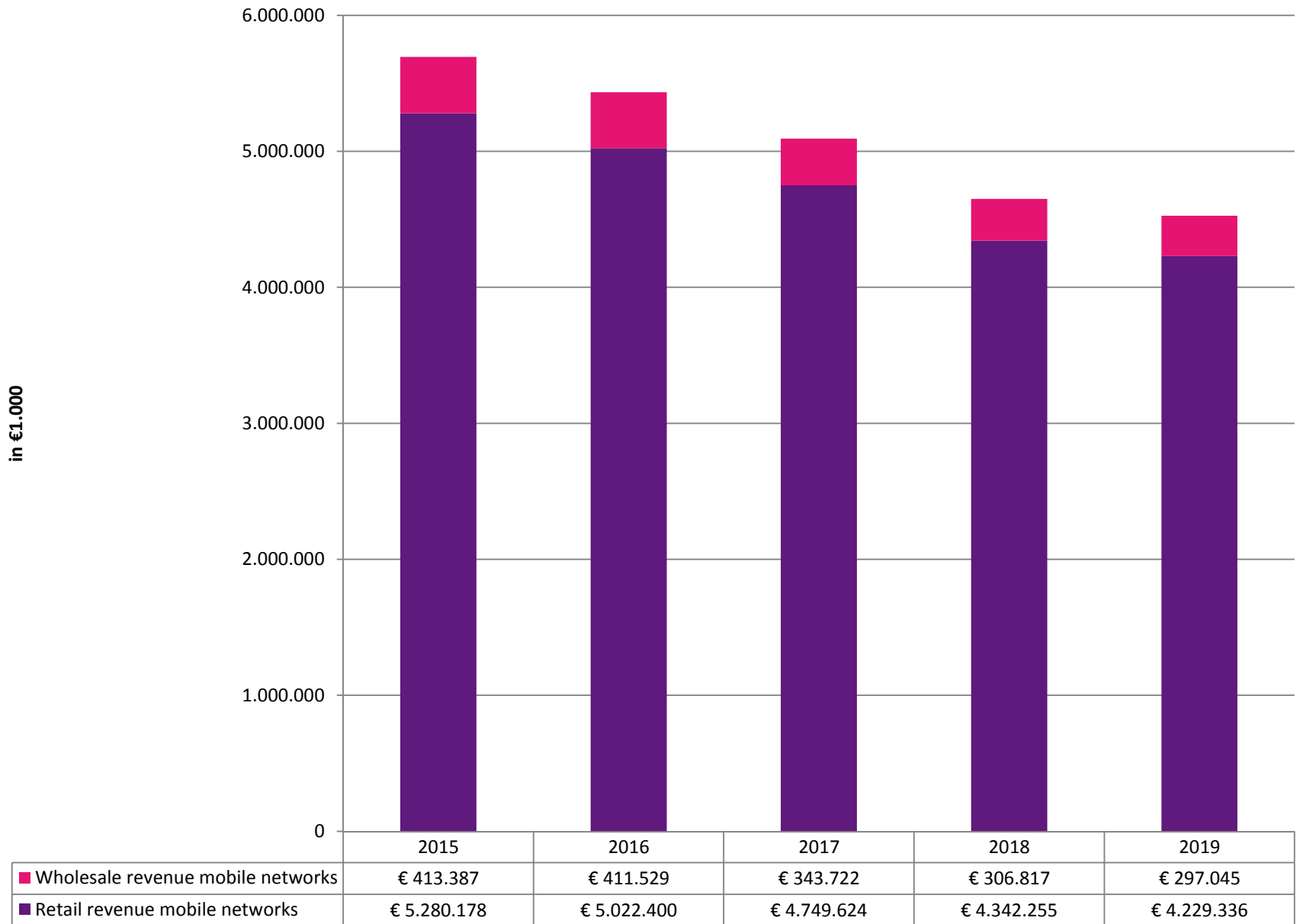
## Fixed network related revenues



Op basis van vragen 0\_A1\_3\_1-2-3 en 0\_A1\_4\_1-2-3 van de Telecommonitor

# Annual figures

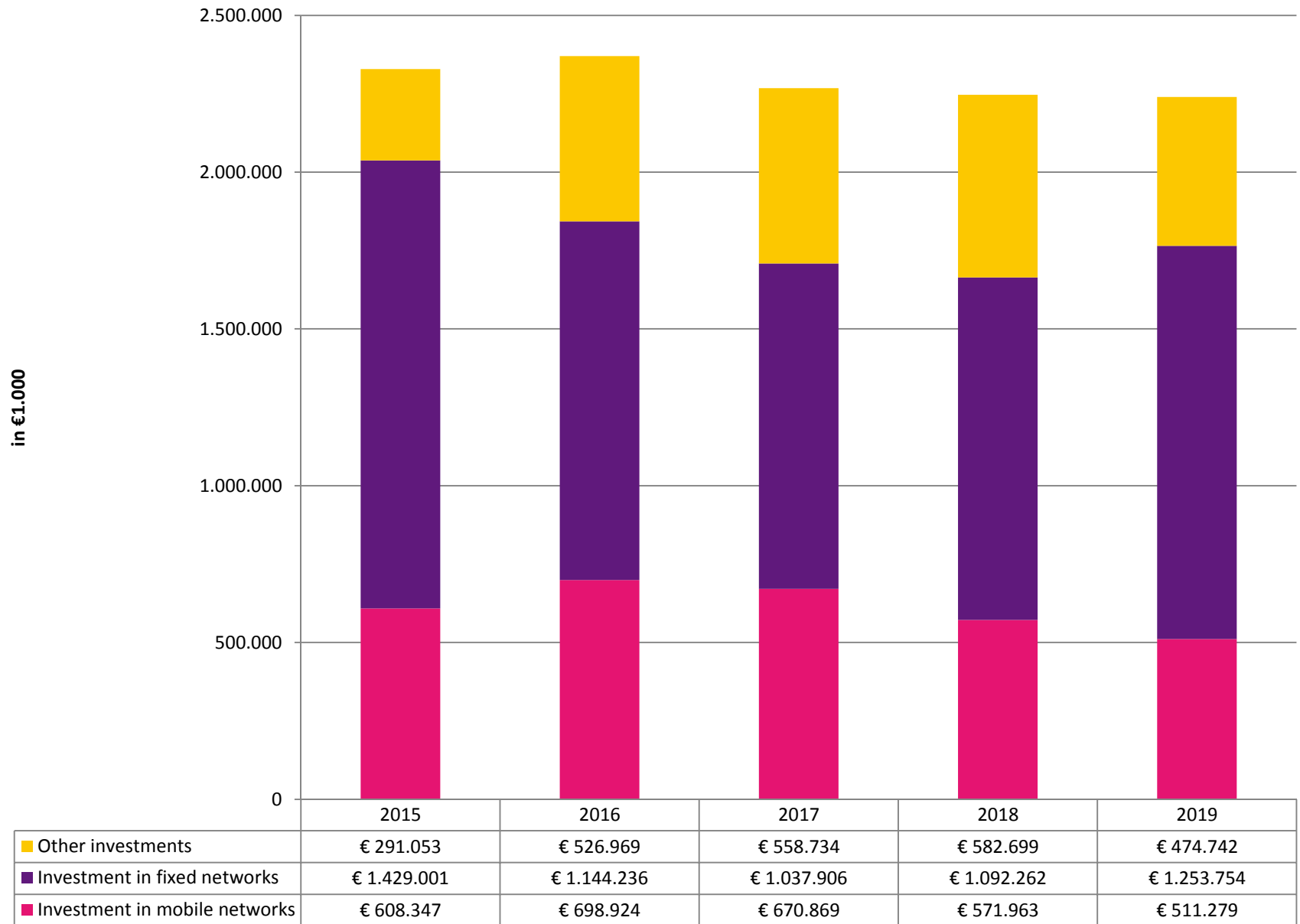
## Mobile network related revenues



Op basis van vragen 0\_A1\_1\_1-2-3 en 0\_A1\_2\_1-2-3 van de Telecommonitor

# Annual figures

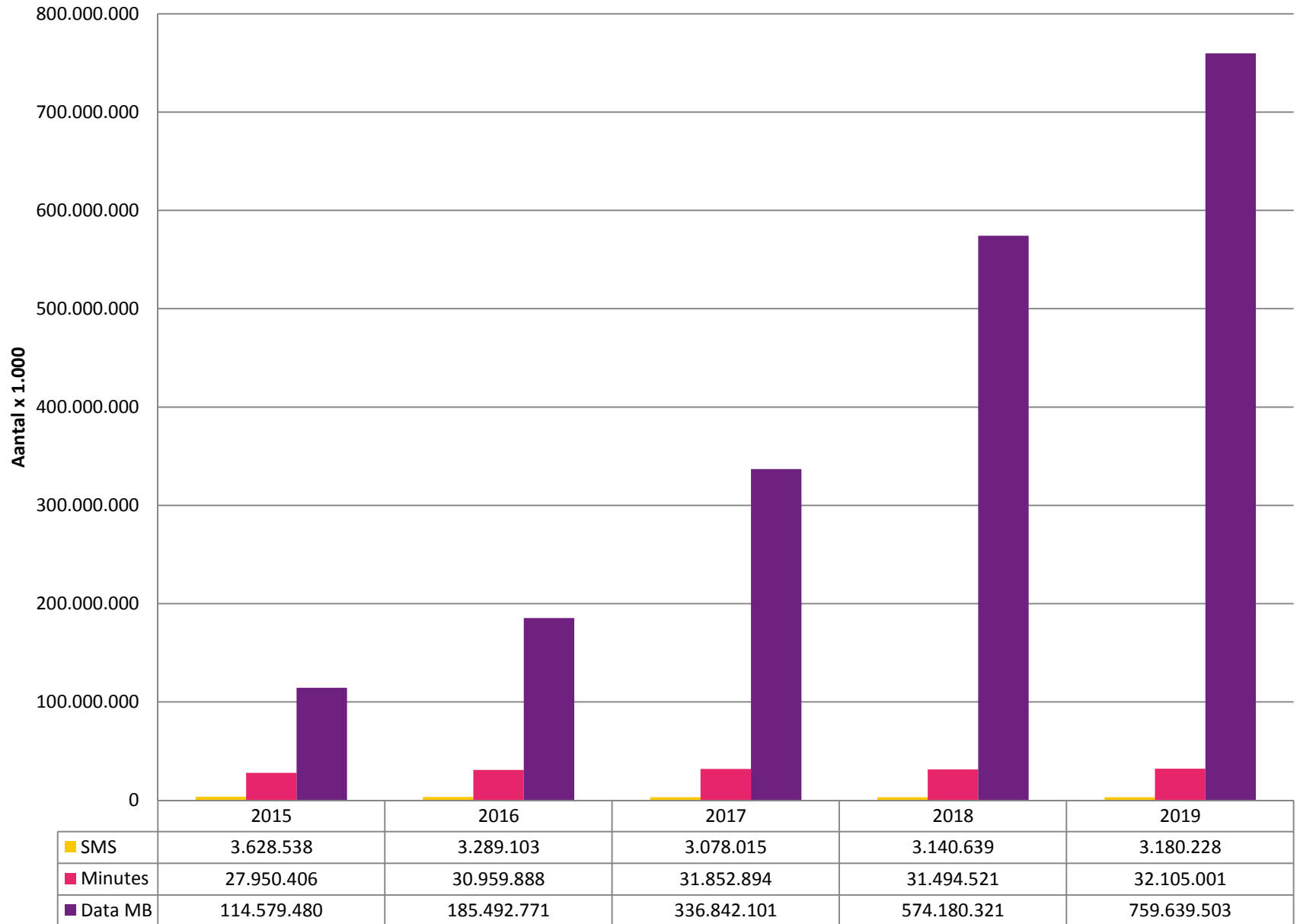
## Mobile and fixed network investments



Op basis van vragen 0\_A2\_1\_1-2-3 van de Telecommonitor

# Annual figures

## Retail volume of voice minutes, data and SMS/text



Op basis van vragen 10\_A3\_1\_1-2-3, 10\_A3\_2\_1-2-3, 10\_A3\_3\_1-2-3, 10\_A3\_4\_1-2-3, en 10\_B3\_1\_1-2-3 van de Telecommonitor

# Annual figures

## Retail connections by speed



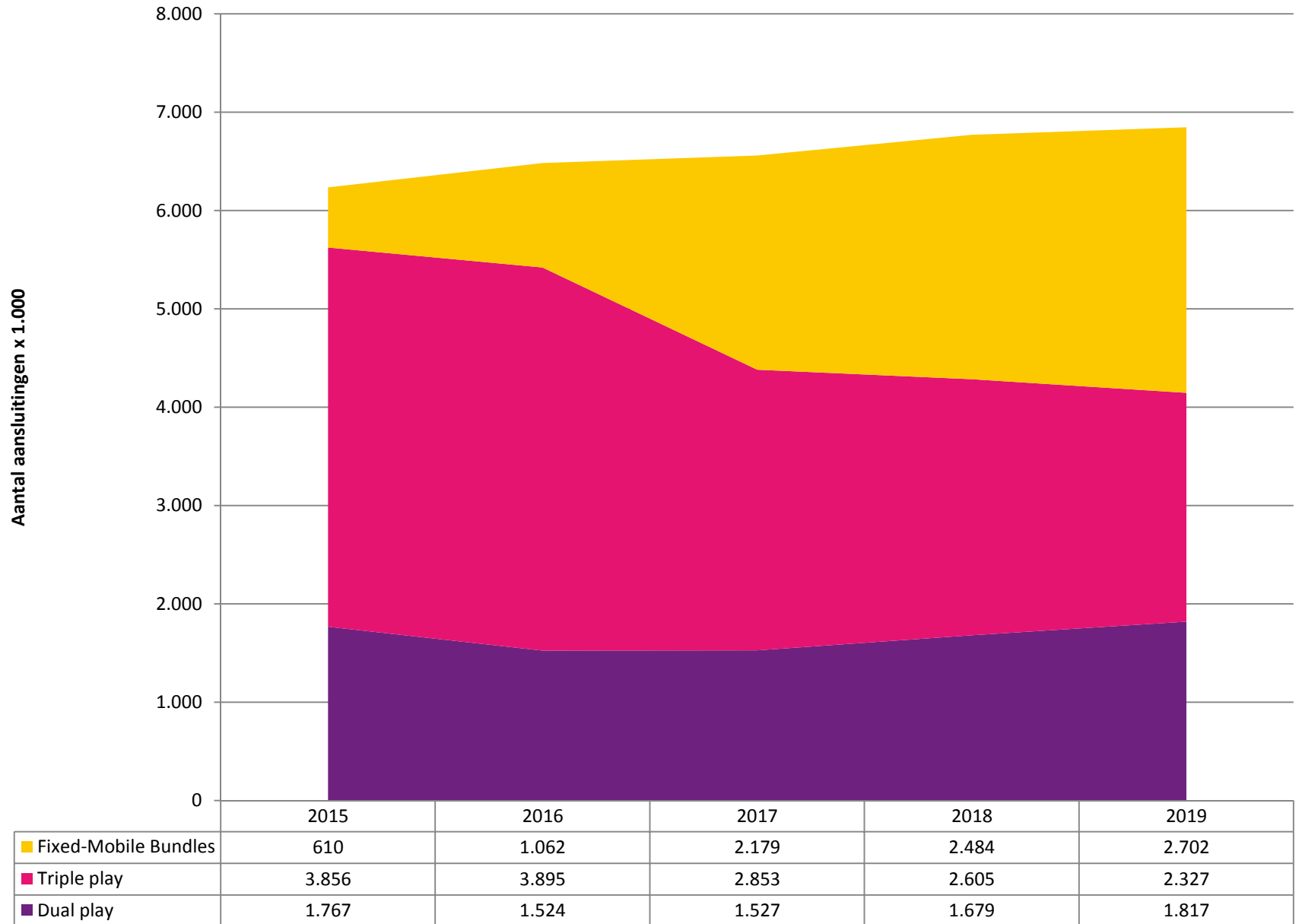
	2015	2016	2017	2018	2019
■ $\ge 100\text{ Mbps}$	31,4%	32,8%	41,4%	43,9%	45,7%
■ $\ge 30\text{ Mbps, } < 100\text{ Mbps}$	34,0%	40,9%	45,3%	46,2%	46,0%
■ $\ge 10\text{ Mbps, } < 30\text{ Mbps}$	20,2%	24,4%	11,8%	8,9%	7,7%
■ $< 10\text{ Mbps}$	14,4%	1,8%	1,5%	1,0%	0,6%

Op basis van vragen 50\_A1\_1\_1-2-3-5-6, 50\_A1\_2\_1-2-3-4, en 50\_A1\_3\_1 van de Telecommonitor



# Annual figures

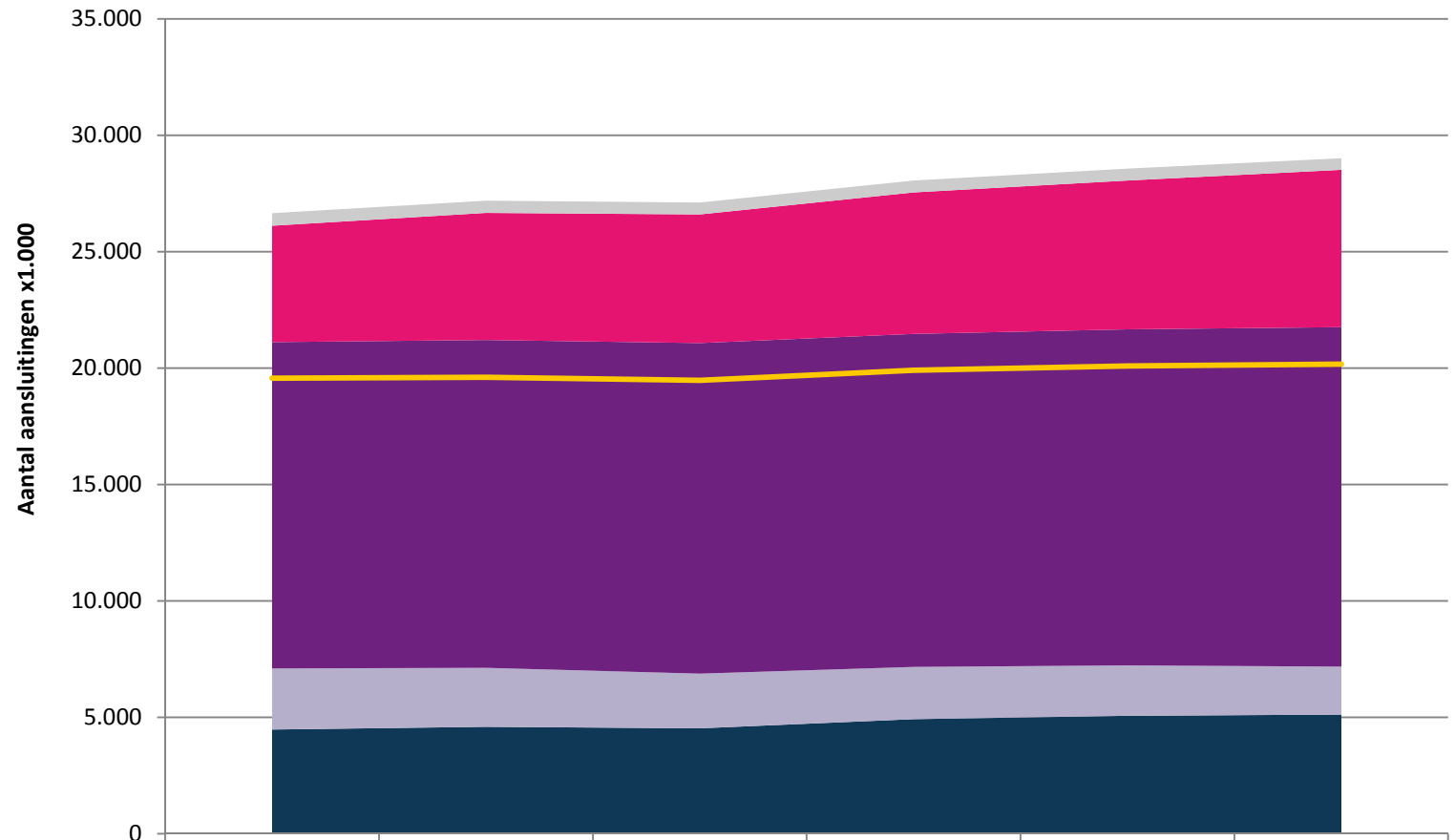
## Bundles of telecommunication services



Op basis van vragen 50\_A1\_1\_1-2-3-5-6, 50\_A1\_2\_1-2-3-4, en 50\_A1\_3\_1 van de Telecommonitor

# Mobile

## Retail connections

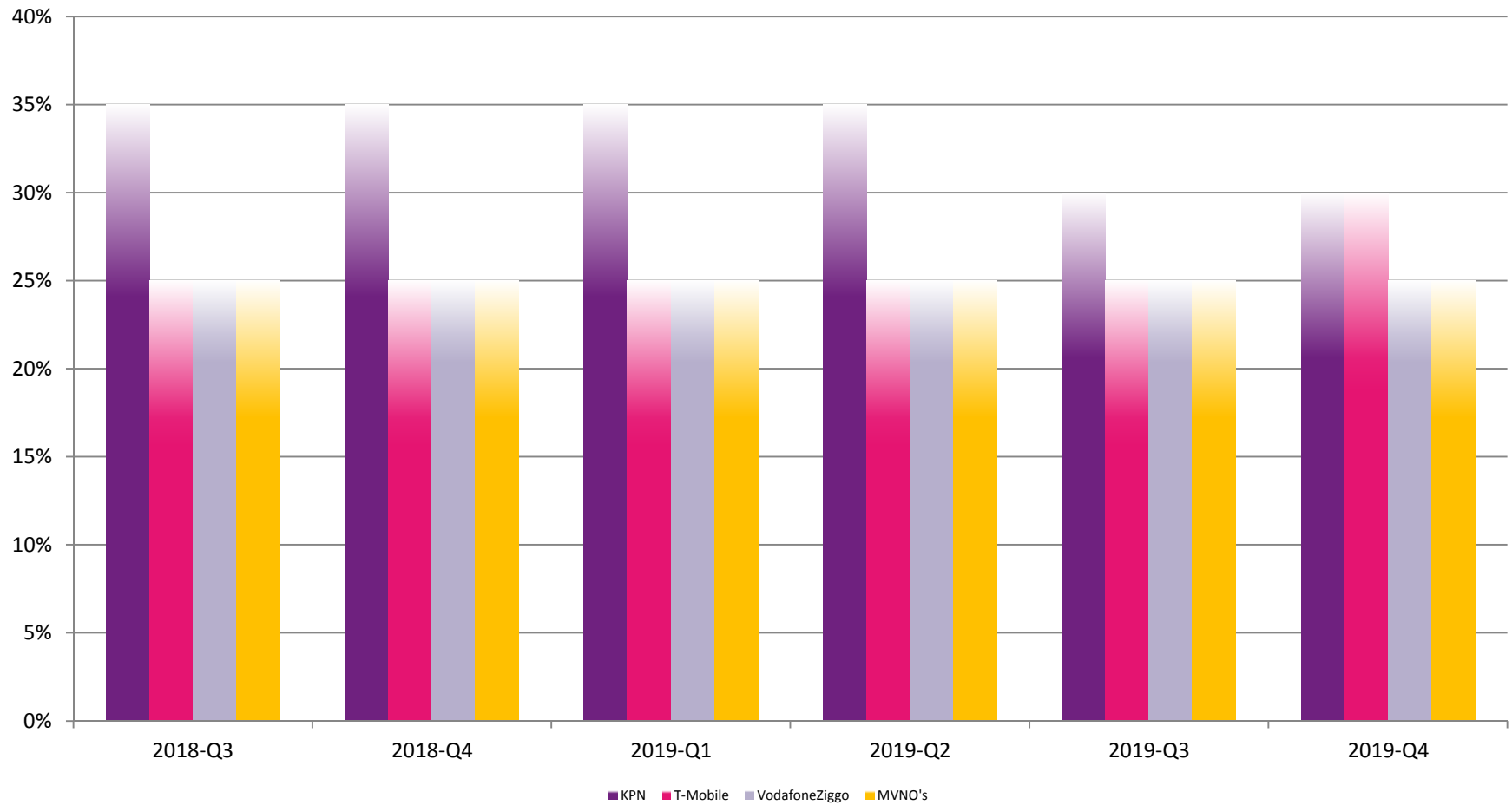


	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
Data only mobile	535	520	503	504	509	505
M2M	5.002	5.456	5.525	6.080	6.385	6.744
Postpaid MNO	14.010	14.078	14.193	14.291	14.433	14.587
Prepaid MNO	2.621	2.534	2.358	2.250	2.167	2.060
Postpaid and prepaid MVNO	4.480	4.595	4.526	4.922	5.068	5.115
Mobile bundle (data and speech)	19.564	19.606	19.468	19.900	20.093	20.170

Op basis van vragen 10\_A1\_1\_1-2-3-4, 10\_A1\_2\_1-2-3-4, 10\_A1\_3\_1-2-3-4, 10\_A1\_4\_1 en 10\_B3\_1\_1-2-3 van de Telecommonitor

# Mobile

## Retail market share based on connections

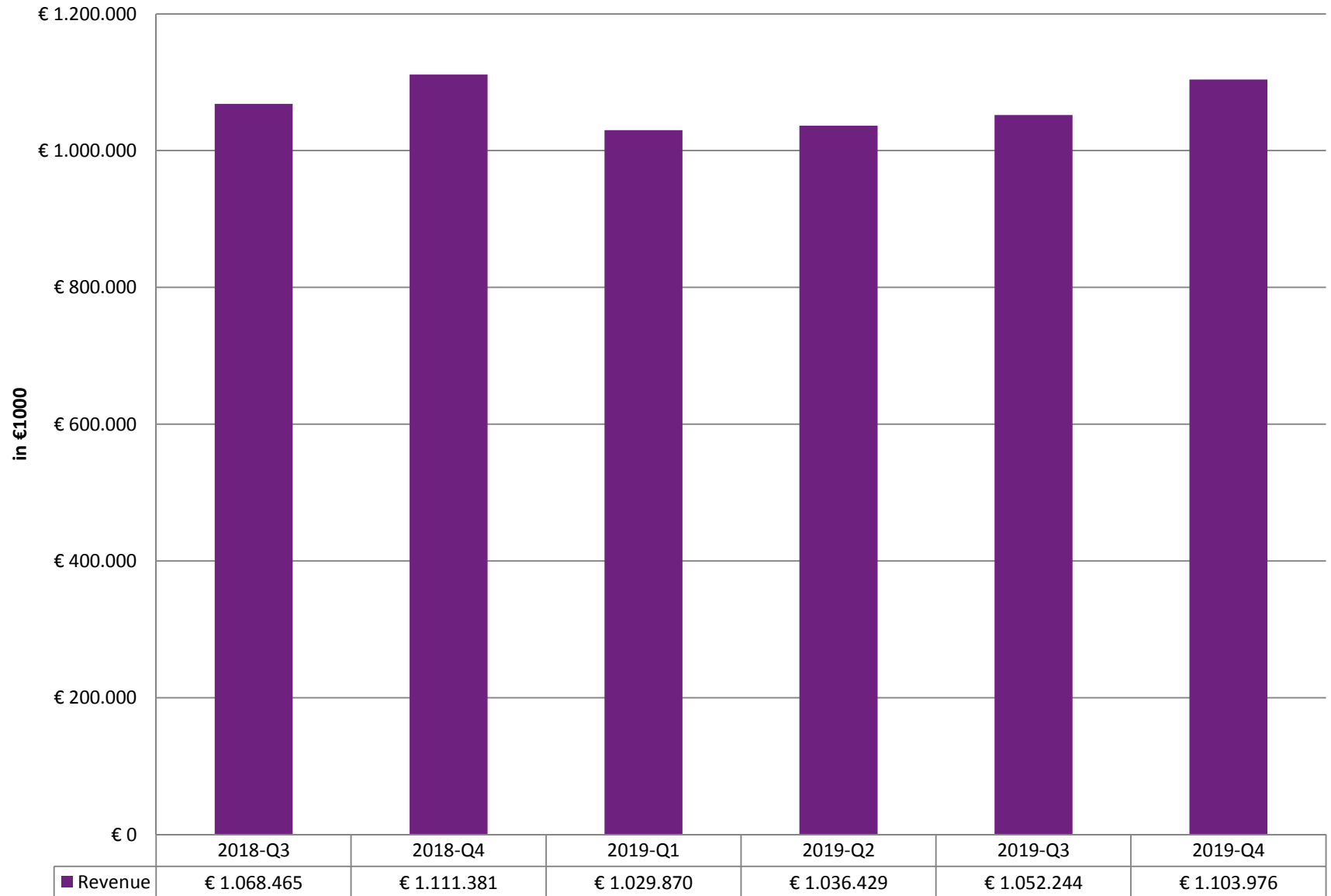


	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[30 - 35%]	[30 - 35%]	[30 - 35%]	[30 - 35%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[25 - 30%]
MVNO's	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]

Op basis van vragen 10\_A1\_1\_1, 10\_A1\_2\_1, 10\_A1\_3\_1, en 10\_B3\_1\_1 van de Telecommonitor

# Mobile

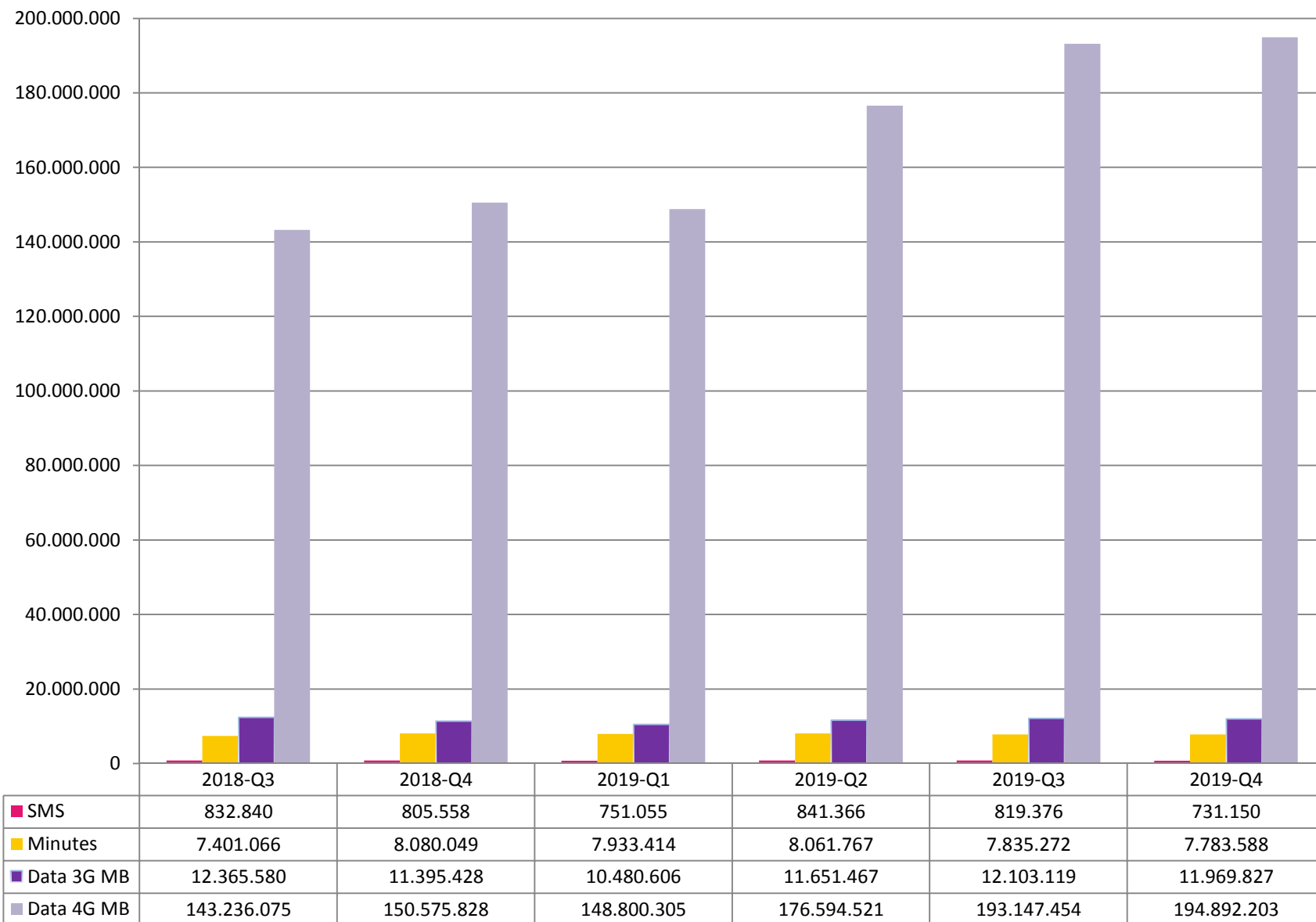
## Retail revenue of Mobile Network Operators (MNOs)



Op basis van vragen 10\_A2\_1-2-3-4, 10\_A2\_2-2-3-4, 10\_A2\_3-2-3-4, en 10\_A2\_4-2-3 van de Telecommonitor

# Mobile

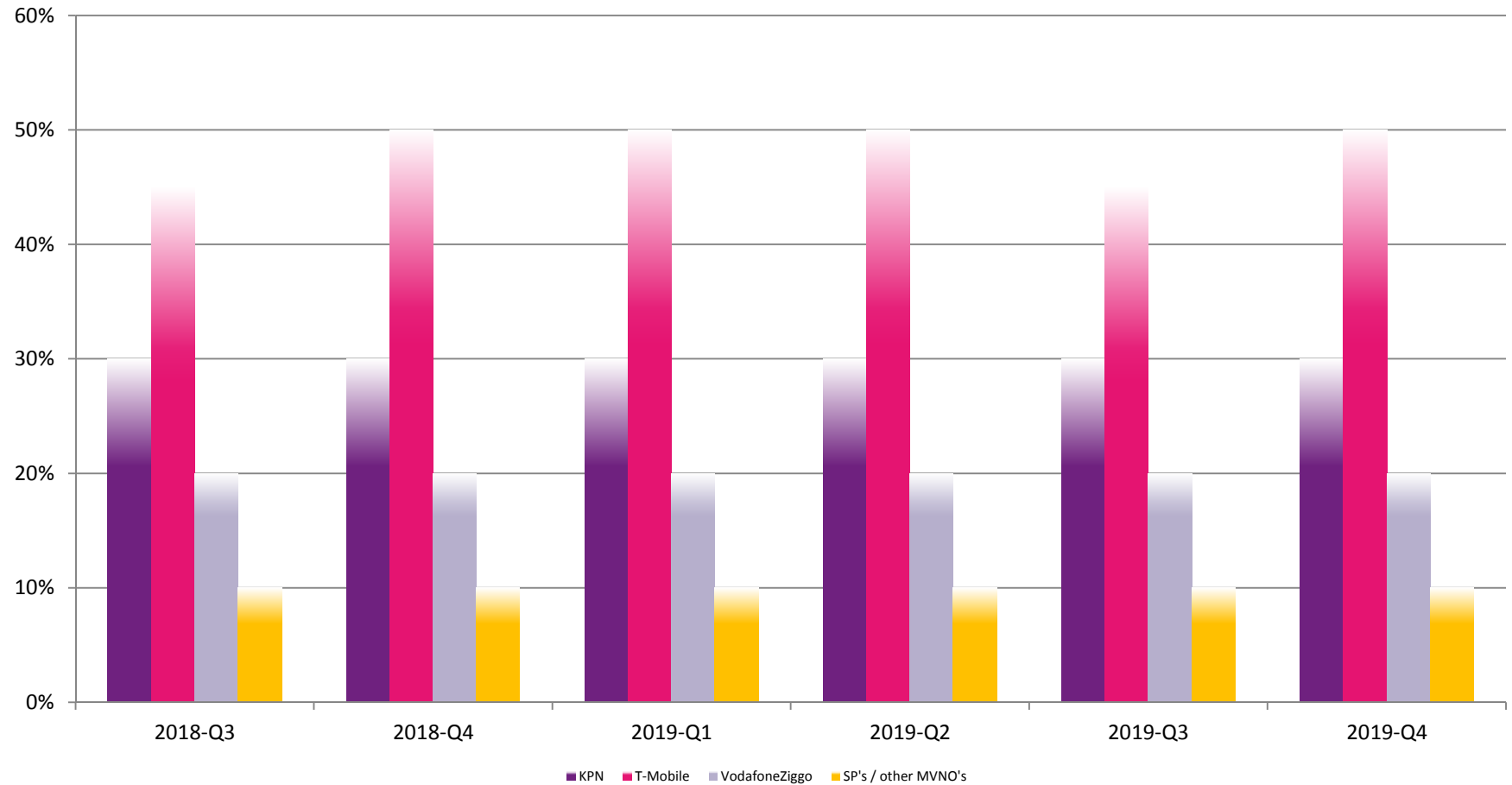
## Retail volume of voice minutes, data and SMS/text



Op basis van vragen 10\_A3\_1\_1-2-3, 10\_A3\_2\_1-2-3, 10\_A3\_3\_1-2-3, 10\_A3\_4\_1-2-3, en 10\_B3\_1\_1-2-3 van de Telecommonitor

# Mobile

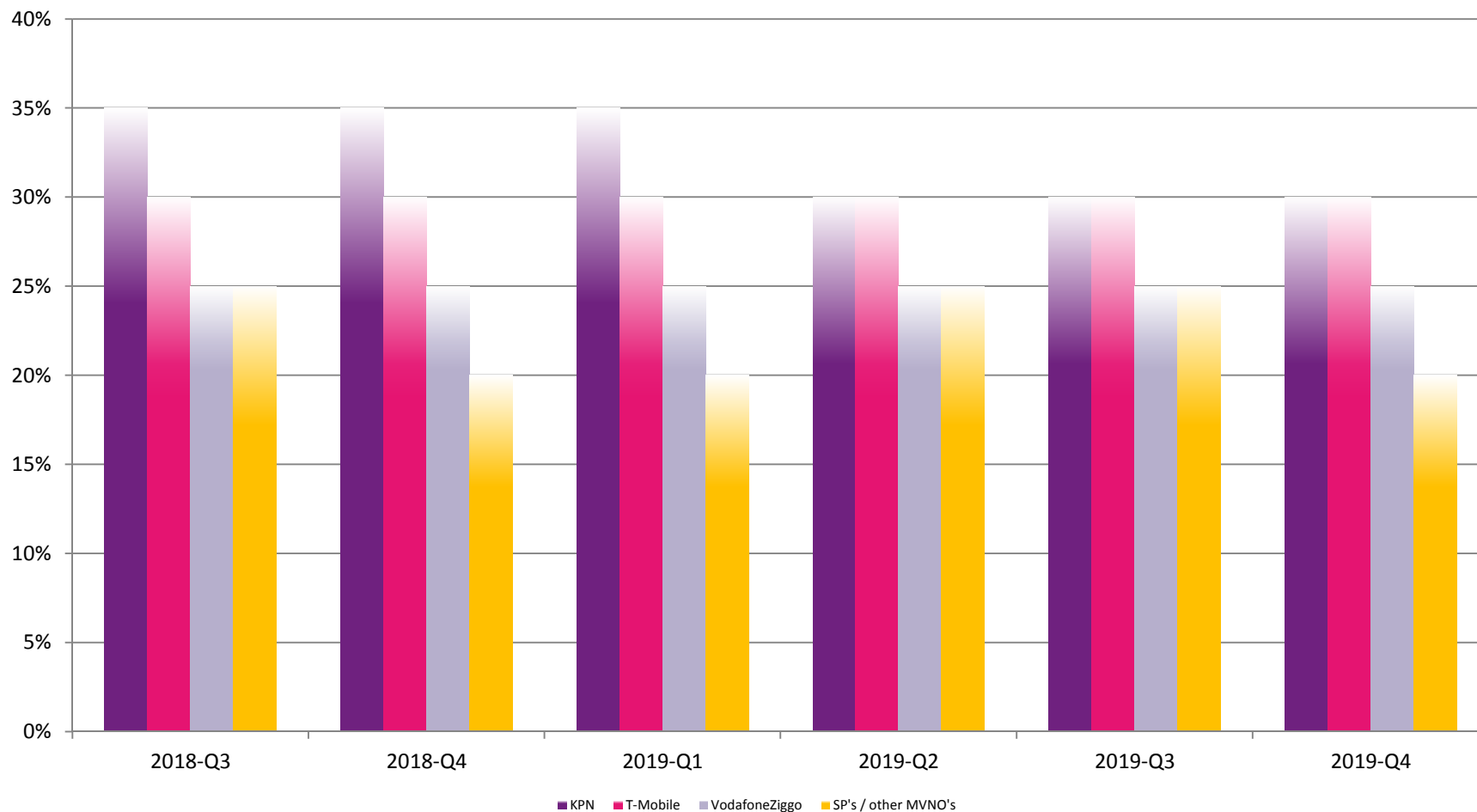
## Retail market share based on data consumption



	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]
T-Mobile	[40 - 45%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[40 - 45%]	[45 - 50%]
SP's / other MVNO's	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]

# Mobile

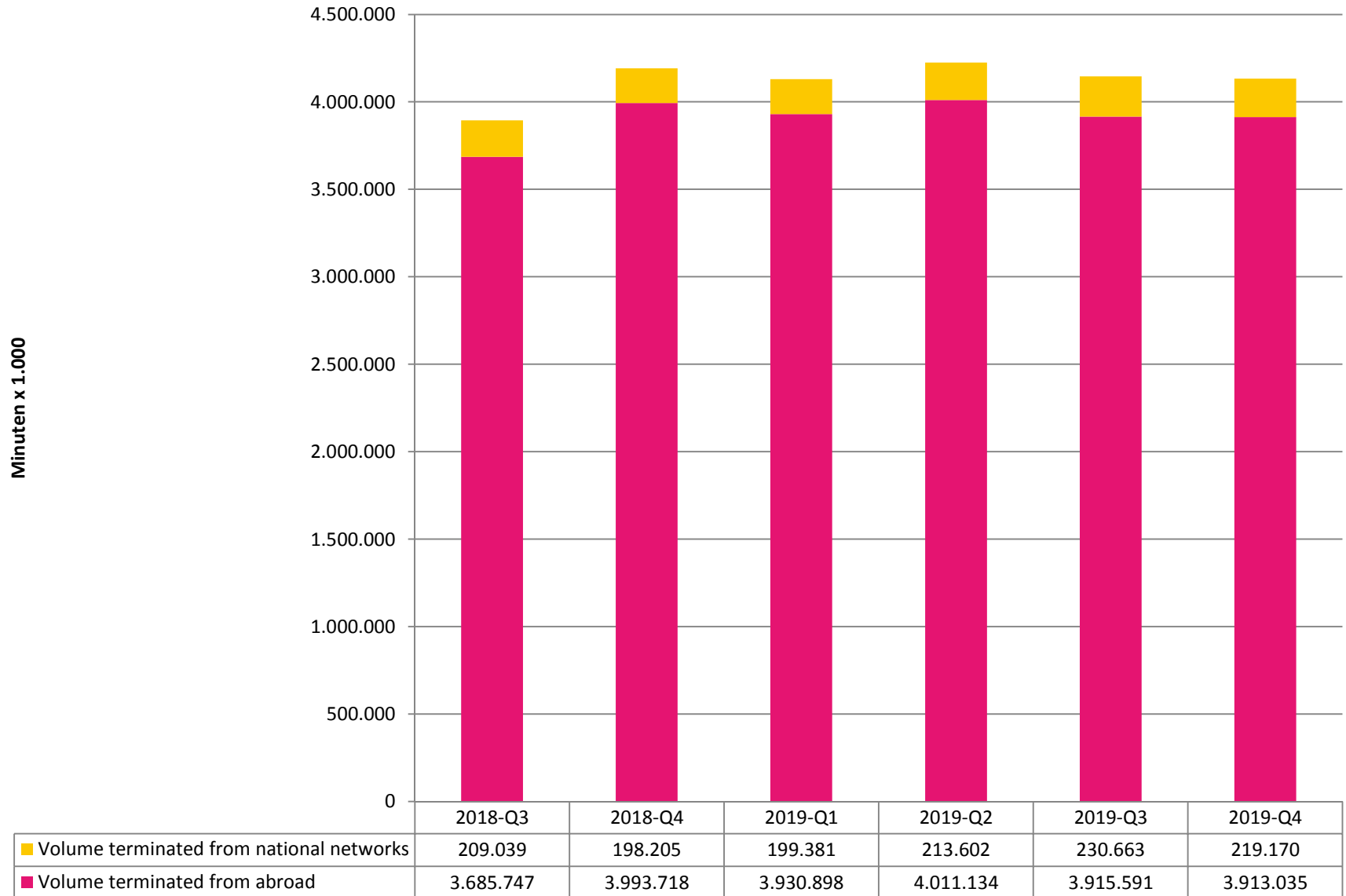
## Retail market share based on consumed voice minutes



	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[30 - 35%]	[30 - 35%]	[30 - 35%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[20 - 25%]
T-Mobile	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
SP's / other MVNO's	[20 - 25%]	[15 - 20%]	[15 - 20%]	[20 - 25%]	[20 - 25%]	[15 - 20%]

# Mobile

## Wholesale volume of call termination (excluding onnet)

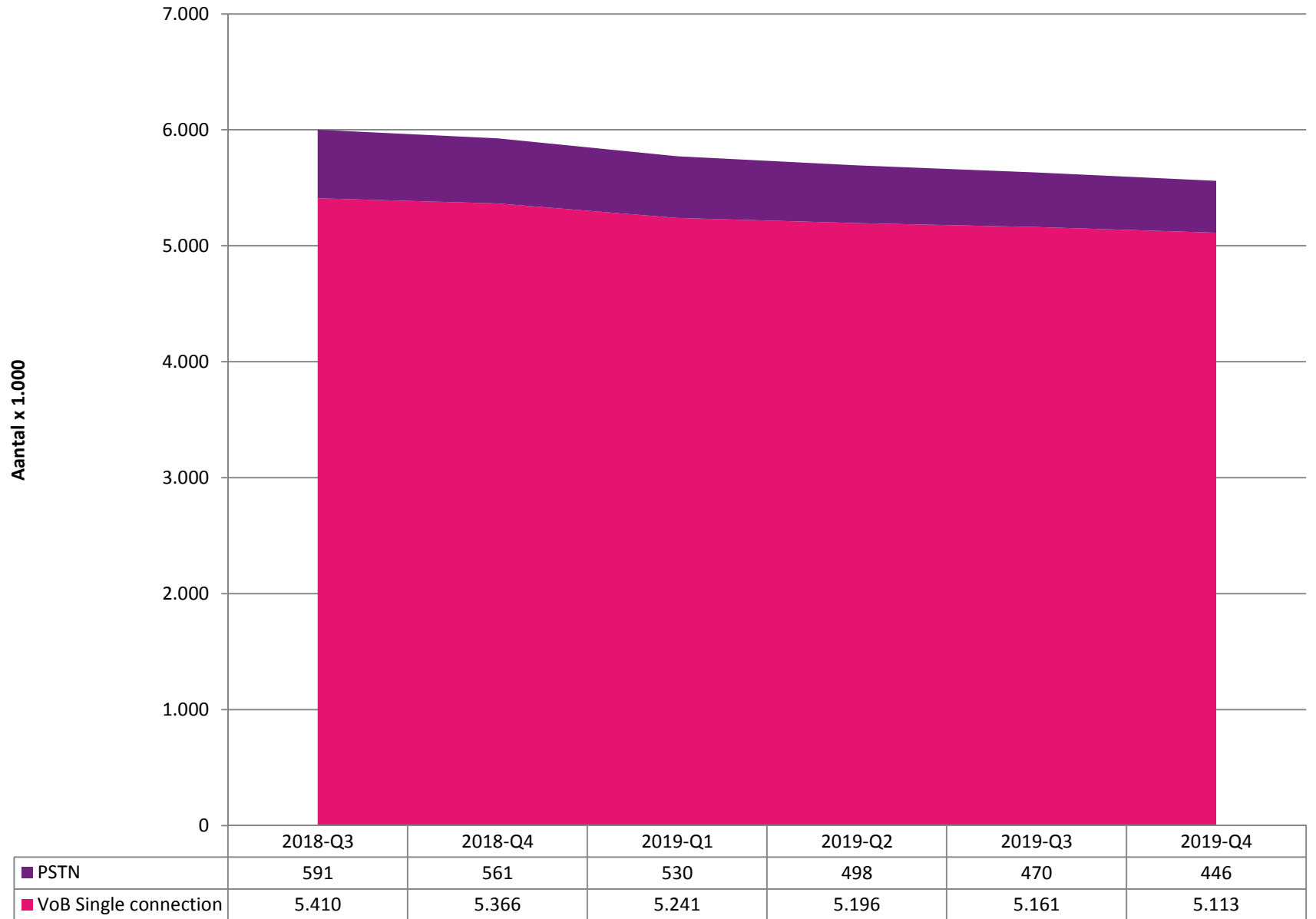


Op basis van vragen 10\_C2\_1\_1-2-3-4-5 van de Telecommonitor



# Fixed telephony

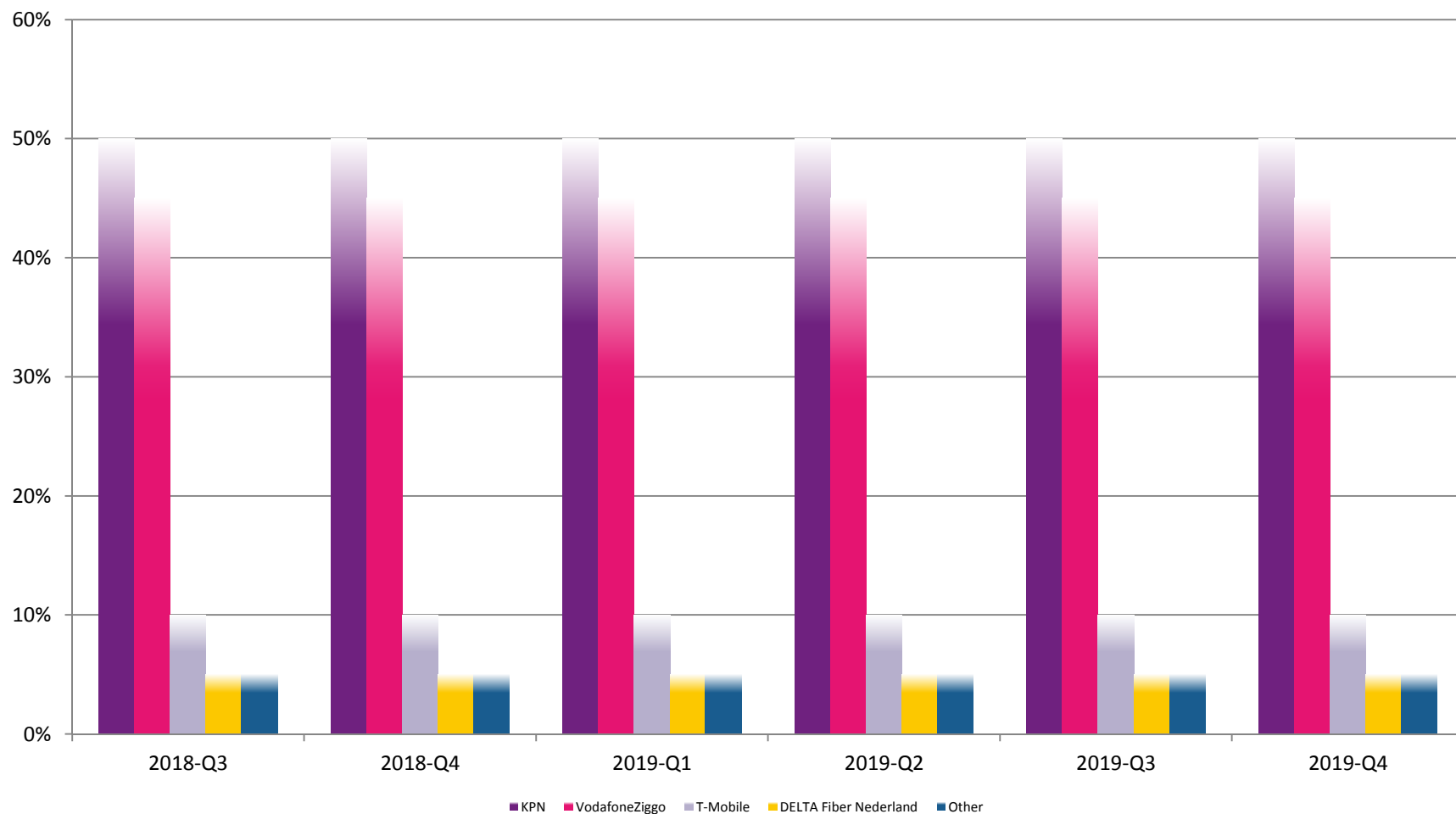
## Retail single connections



Op basis van vragen 20\_A1\_1\_1-2-3-4-5-6 en 20\_A1\_7\_1-2-3-4-5 van de Telecommonitor

# Fixed telephony

## Retail market share based on single connections

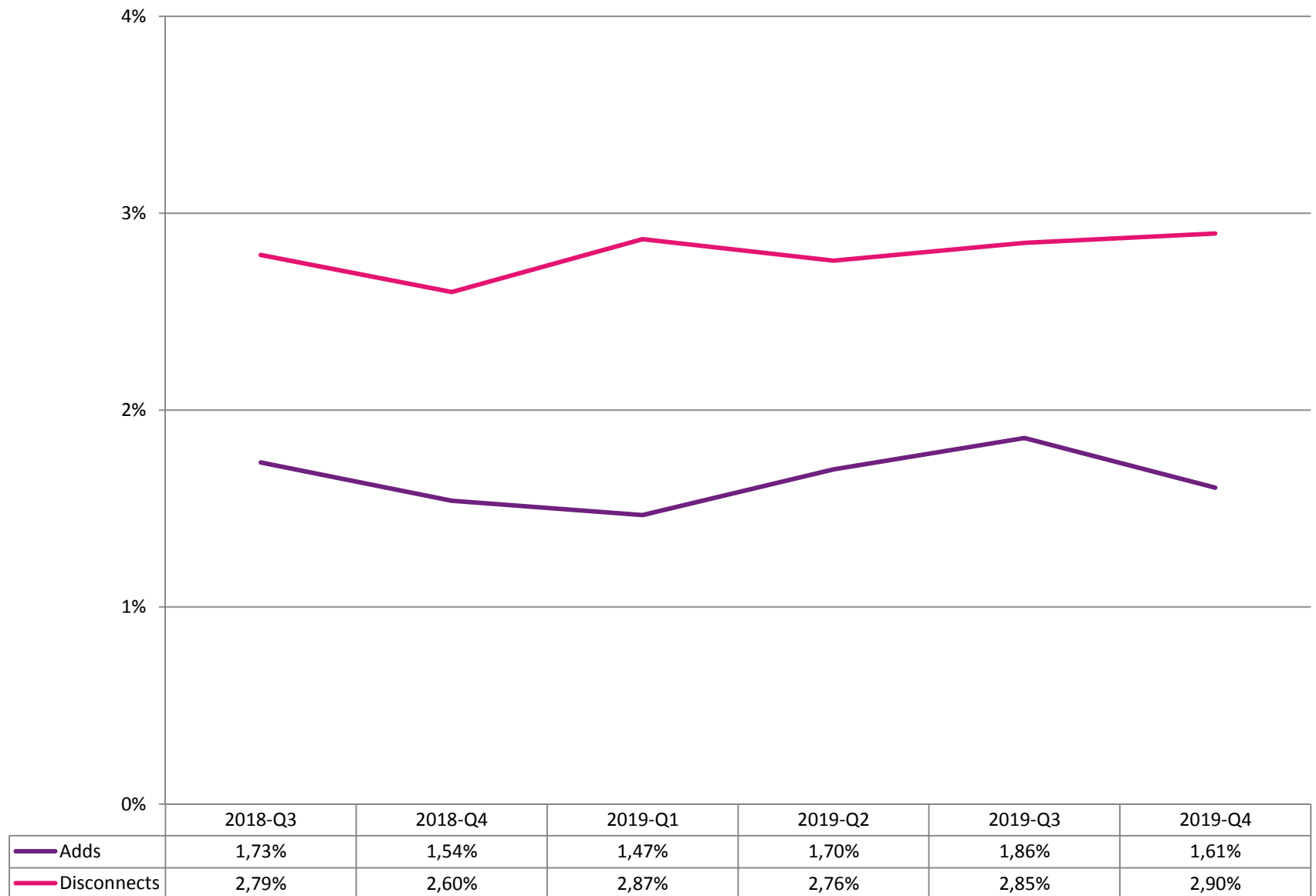


	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

Op basis van vragen 20\_A1\_1\_1-2-3-4-5-6 en 20\_A1\_7\_1-2-3-4-5 van de Telecommonitor

# Fixed telephony

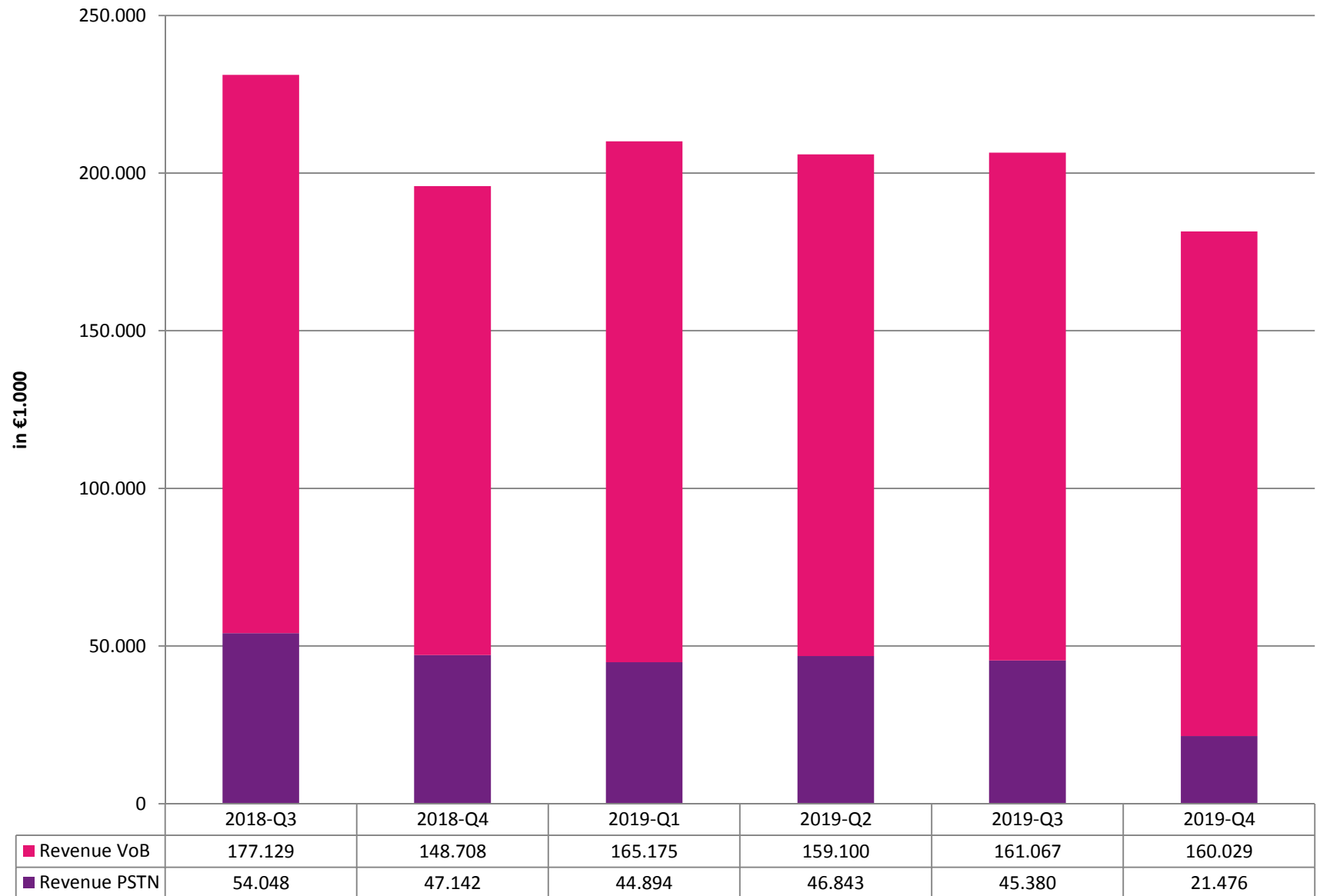
## Retail churn of single connections



Op basis van vragen 20\_A2\_1\_1-2 en 20\_A2\_7\_1-2 van de Telecommonitor

# Fixed telephony

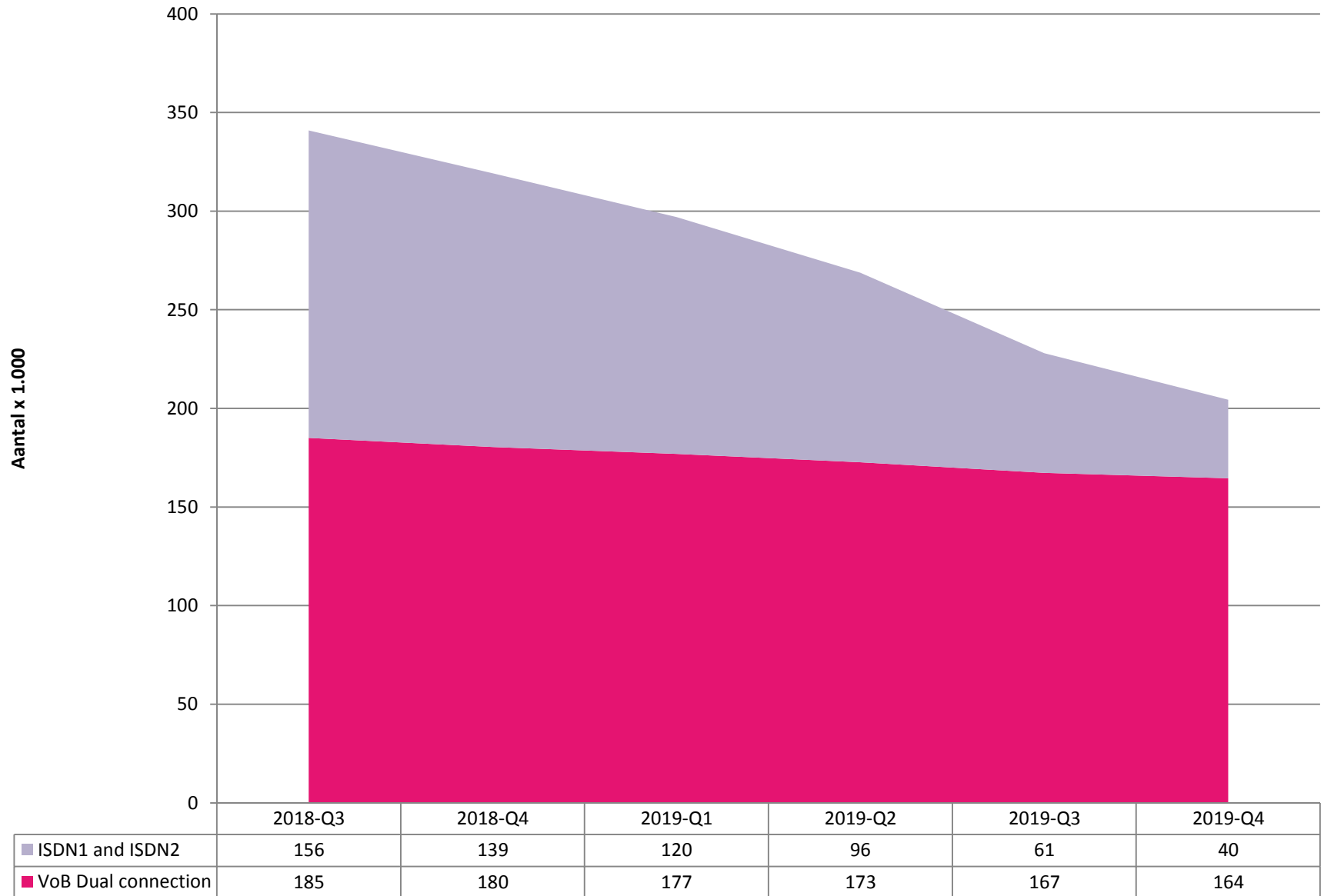
## Retail turnover PSTN and VoB



Op basis van vragen 20\_A3\_1\_1, 20\_A3\_1\_2, 20\_A3\_7\_1, en 20\_A3\_7\_2 van de Telecommonitor

# Fixed telephony

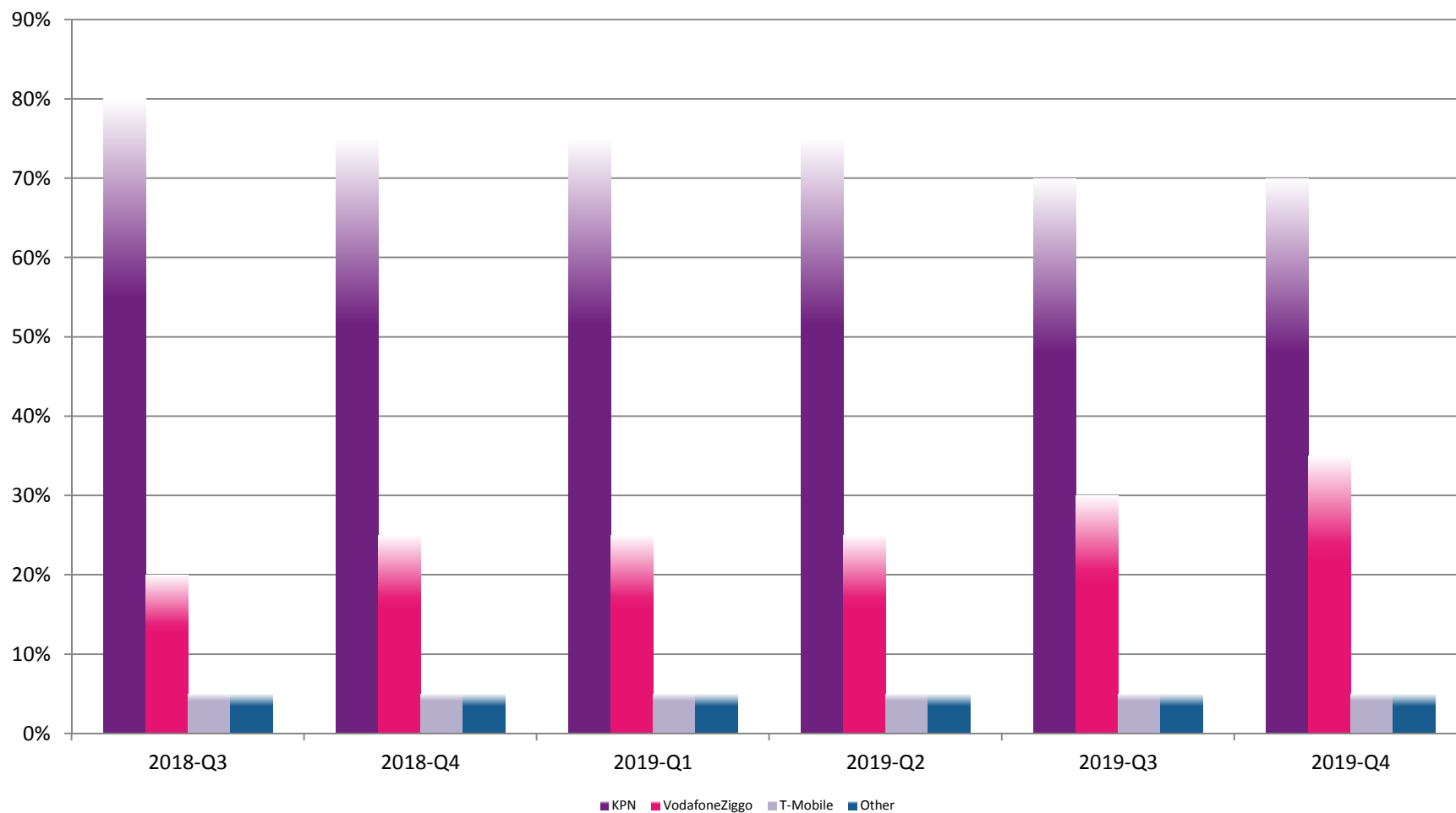
## Retail dual connections



Op basis van vragen 20\_A1\_2\_1-2-3-4-5-6, 20\_A1\_3\_1-2-3-4-5-6, en 20\_A1\_8\_1-2-3-4-5 van de Telecommonitor

# Fixed telephony

## Retail market share based on dual connections

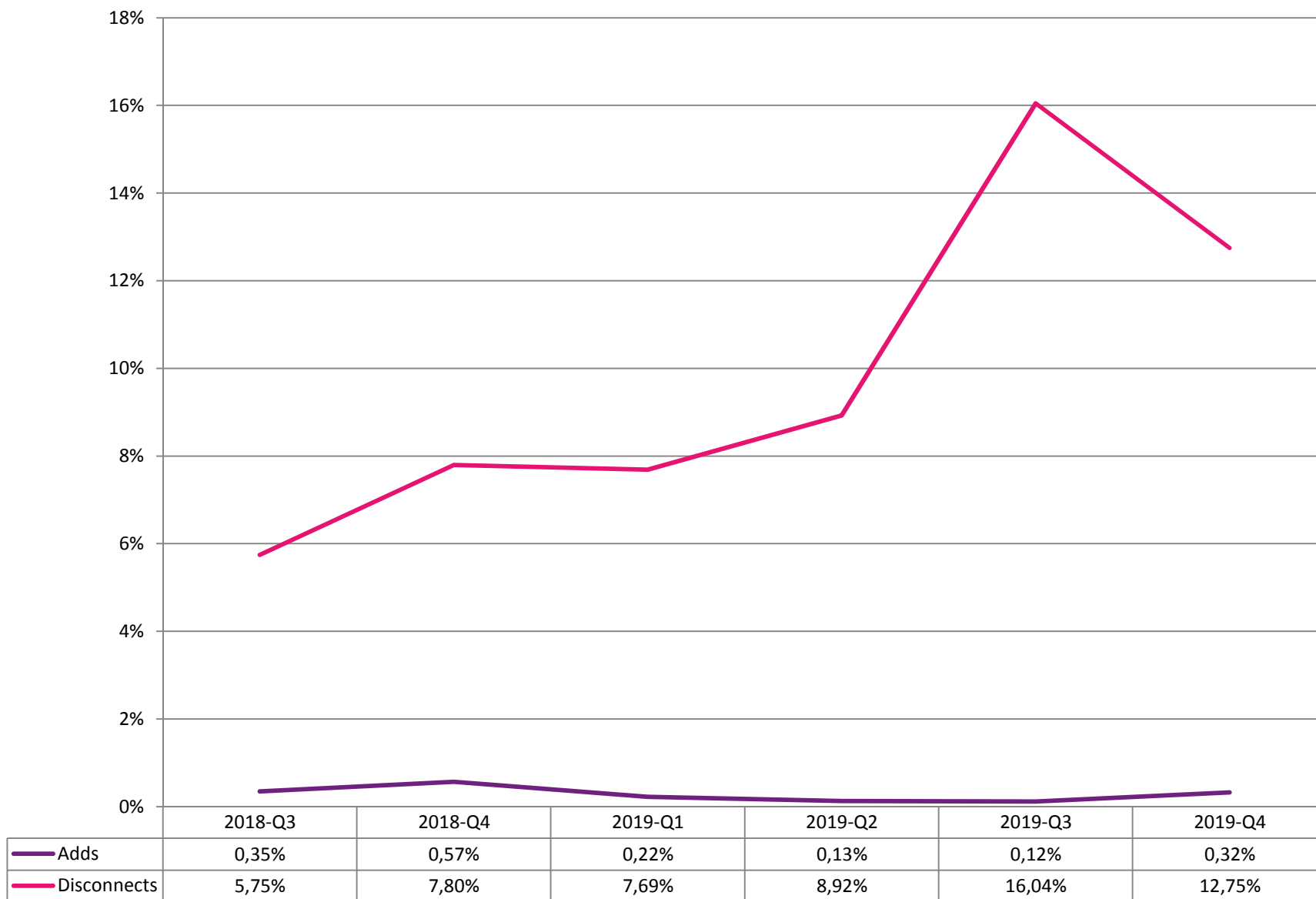


	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[75 - 80%]	[70 - 75%]	[70 - 75%]	[70 - 75%]	[65 - 70%]	[65 - 70%]
VodafoneZiggo	[15 - 20%]	[20 - 25%]	[20 - 25%]	[20 - 25%]	[25 - 30%]	[30 - 35%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

Op basis van vragen 20\_A1\_2\_1-2-3-4-5-6, 20\_A1\_3\_1-2-3-4-5-6, en 20\_A1\_8\_1-2-3-4-5 van de Telecommonitor

# Fixed telephony

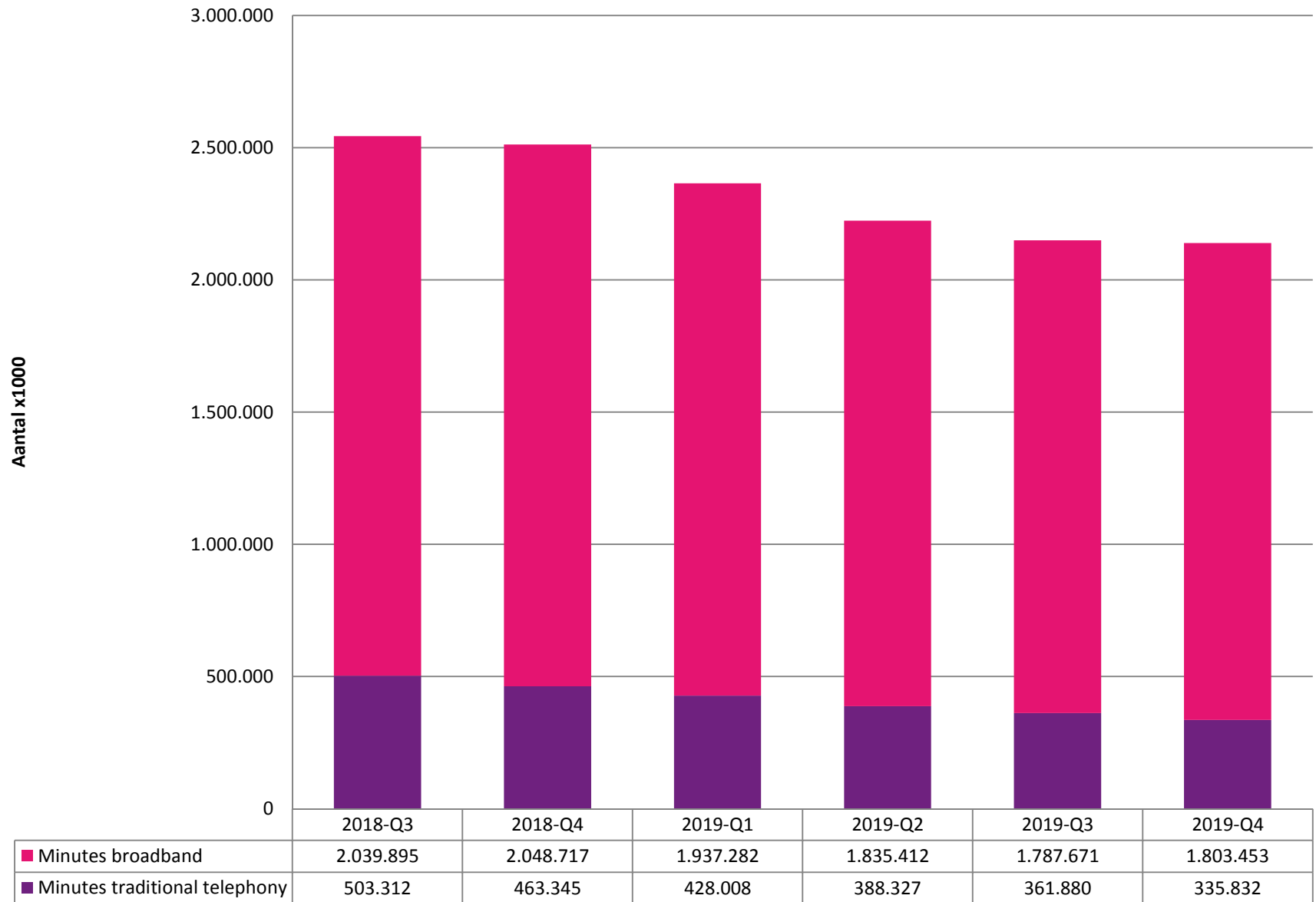
## Retail churn of dual connections



Op basis van vragen 20\_A2\_2\_1-2, 20\_A2\_3\_1-2 en 20\_A2\_8\_1-2 van de Telecommonitor

# Fixed telephony

## Retail volume based on voice minutes

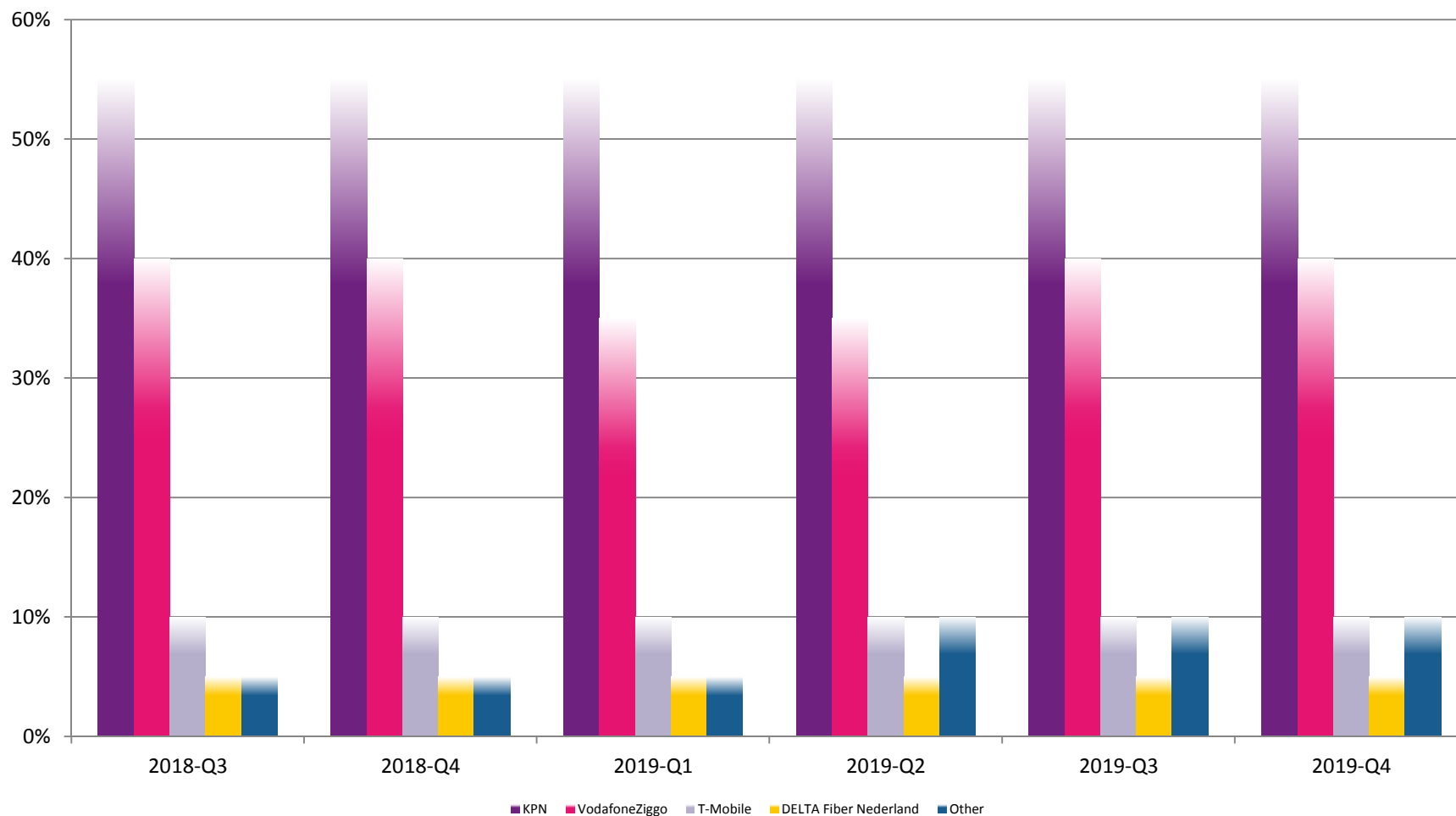


Op basis van vragen 20\_A4\_2\_1-2-3-4 van de Telecommonitor



# Fixed telephony

## Retail market share based on voice minutes

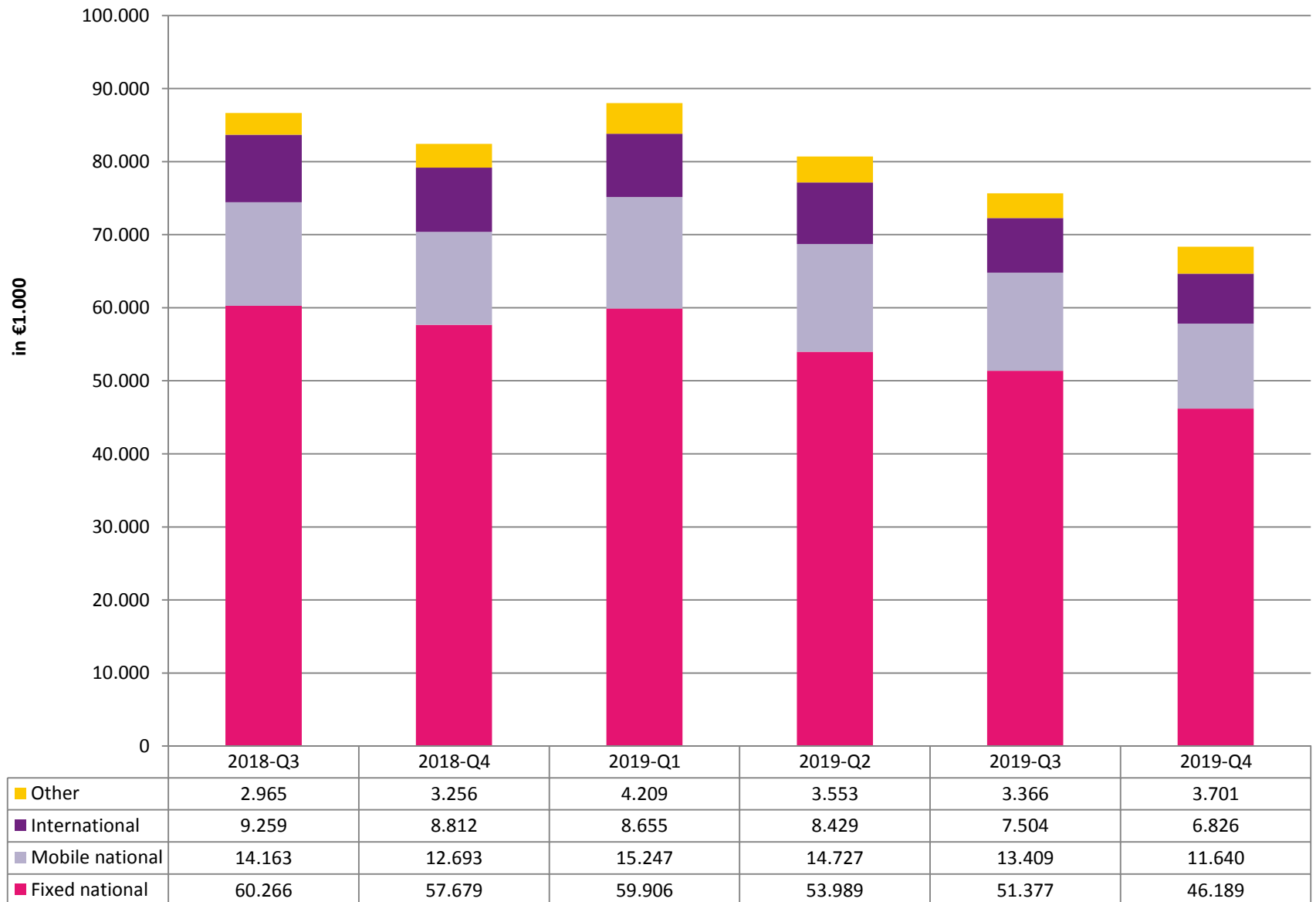


	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]
VodafoneZiggo	[35 - 40%]	[35 - 40%]	[30 - 35%]	[30 - 35%]	[35 - 40%]	[35 - 40%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[5 - 10%]	[5 - 10%]	[5 - 10%]

Op basis van vragen 20\_A4\_2\_1-2-3-4 van de Telecommonitor

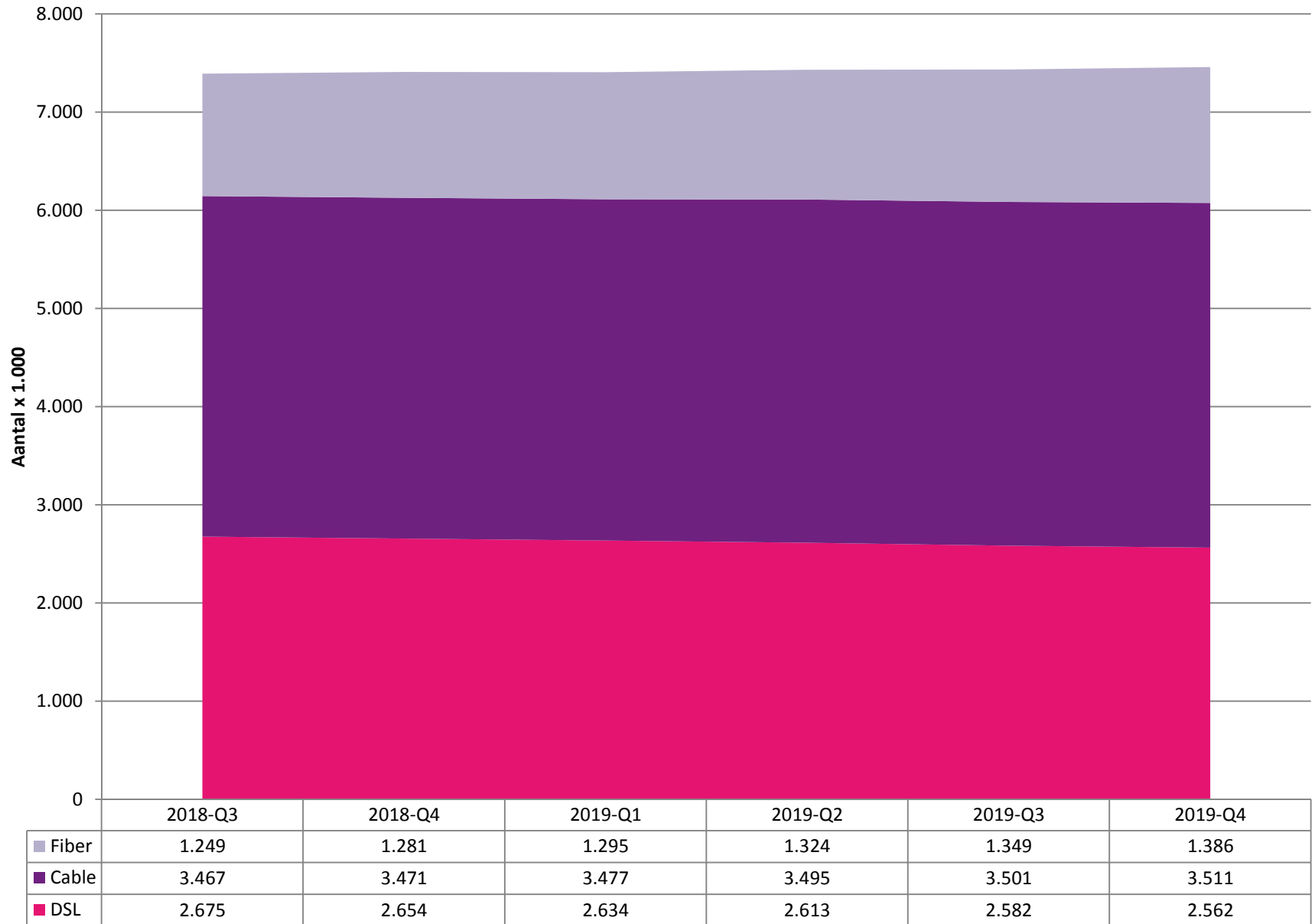
# Fixed telephony

## Retail turnover per type of traffic



# Broadband

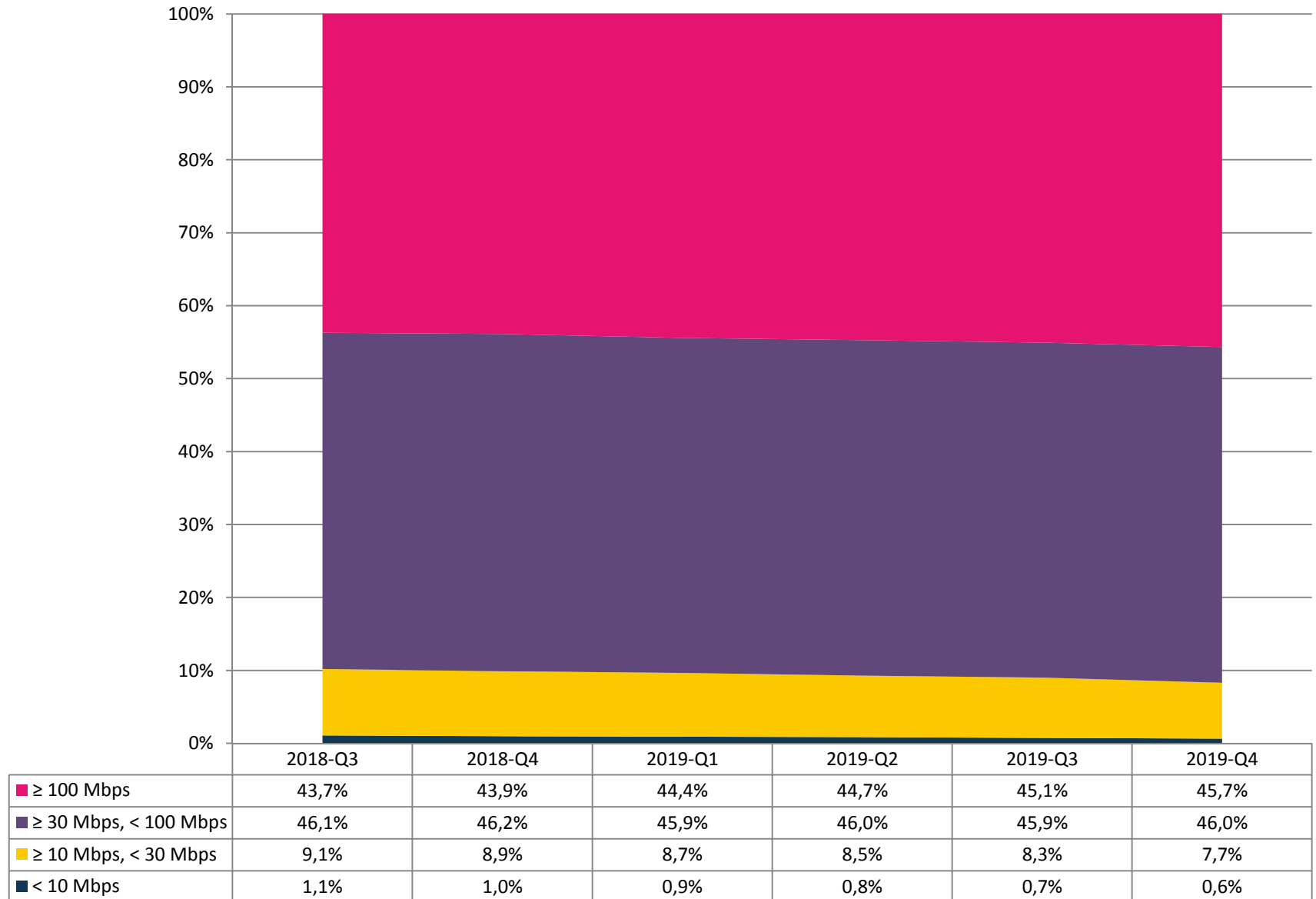
## Retail connections per type



Op basis van vragen 30\_A1\_1\_1-2-3-4-5, 30\_A1\_2\_1-2-3-4-5, 30\_A1\_3\_1-2-3-4-5, 30\_A1\_4\_1-2-3-4-5, 30\_A1\_5\_1-2-3-4-5, en 30\_A1\_6\_1 van de Telecommonitor

# Broadband

## Retail connections by speed



Op basis van vragen 30\_A1\_1\_1-2-3-4-5, 30\_A1\_2\_1-2-3-4-5, 30\_A1\_3\_1-2-3-4-5, 30\_A1\_4\_1-2-3-4-5, en 30\_A1\_5\_1-2-3-4-5 van de Telecommonitor. Snelheid op basis van geadverteerde snelheid

# Broadband

## Retail DSL-connections by speed



	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
■ DSL ≥ 100 Mbps	644	649	654	673	680	705
■ DSL ≥ 30 Mbps, < 100 Mbps	1.510	1.507	1.505	1.515	1.493	1.494
■ DSL ≥ 10 Mbps, < 30 Mbps	447	430	413	368	359	318
■ DSL ≥ 2Mbps, < 10 Mbps	69	63	58	53	46	40

Op basis van vragen 30\_A1\_1\_1-2-3-4-5 en 30\_A1\_2\_1-2-3-4-5 van de Telecommonitor. Snelheid op basis van geadverteerde snelheid

# Broadband

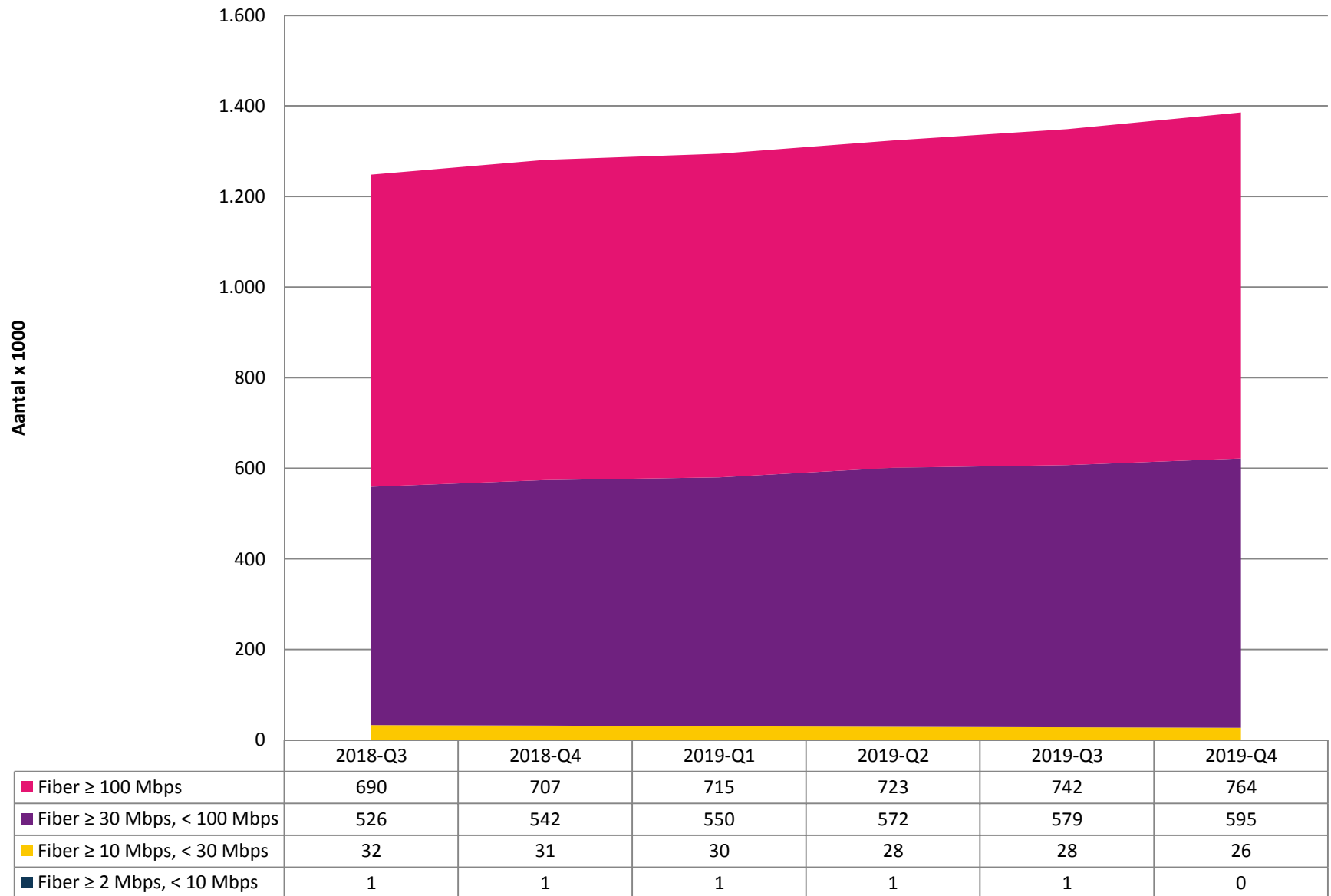
## Retail cable connections by speed



Op basis van vragen 30\_A1\_3\_1-2-3-4-5 van de Telecommonitor. Snelheid op basis van geadverteerde snelheid

# Broadband

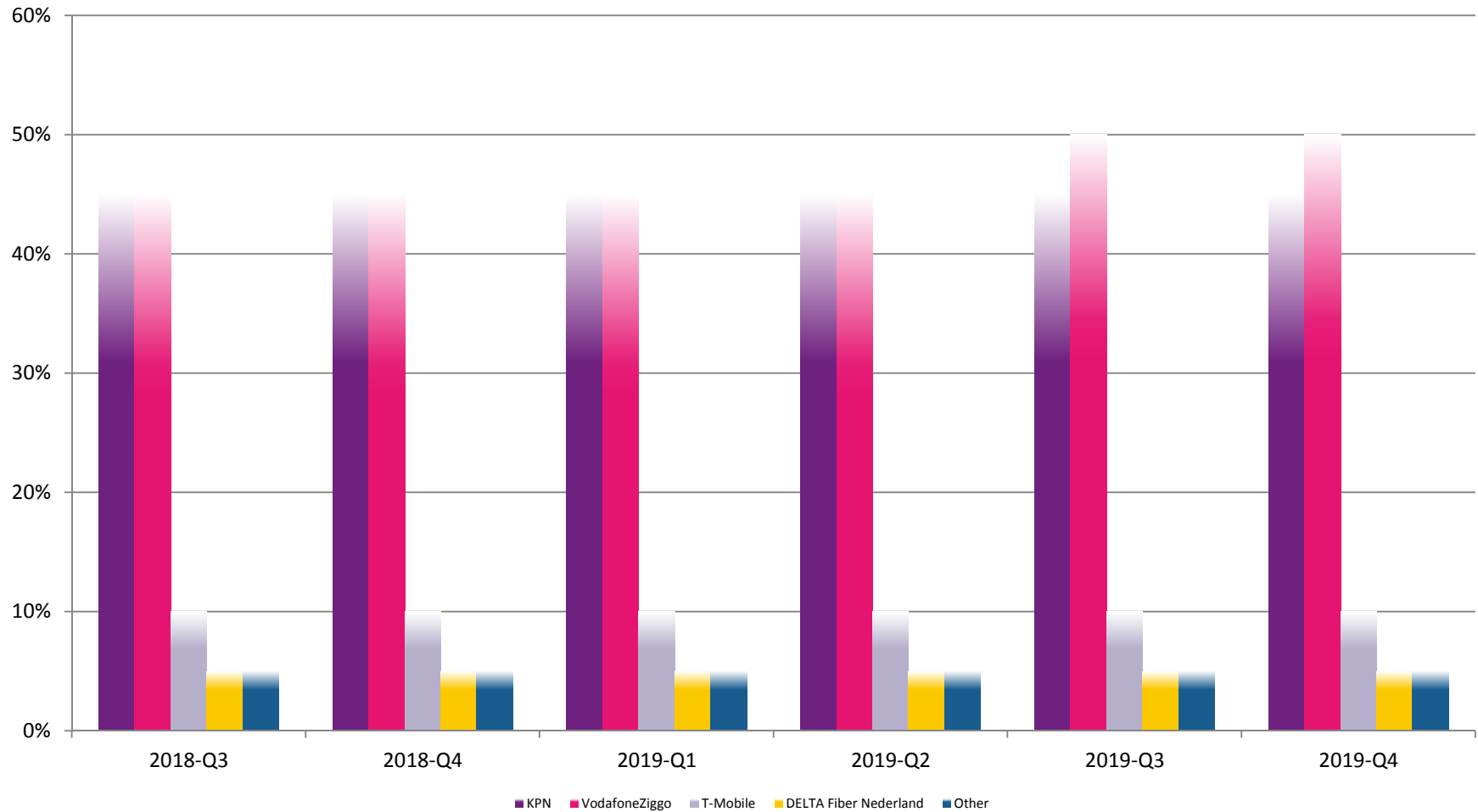
## Retail fiber-optic connections by speed



Op basis van vragen 30\_A1\_4\_1-2-3-4-5, en 30\_A1\_5\_1-2-3-4-5 van de Telecommonitor. Snelheid op basis van geadverteerde snelheid

# Broadband

## Retail market shares based on connections



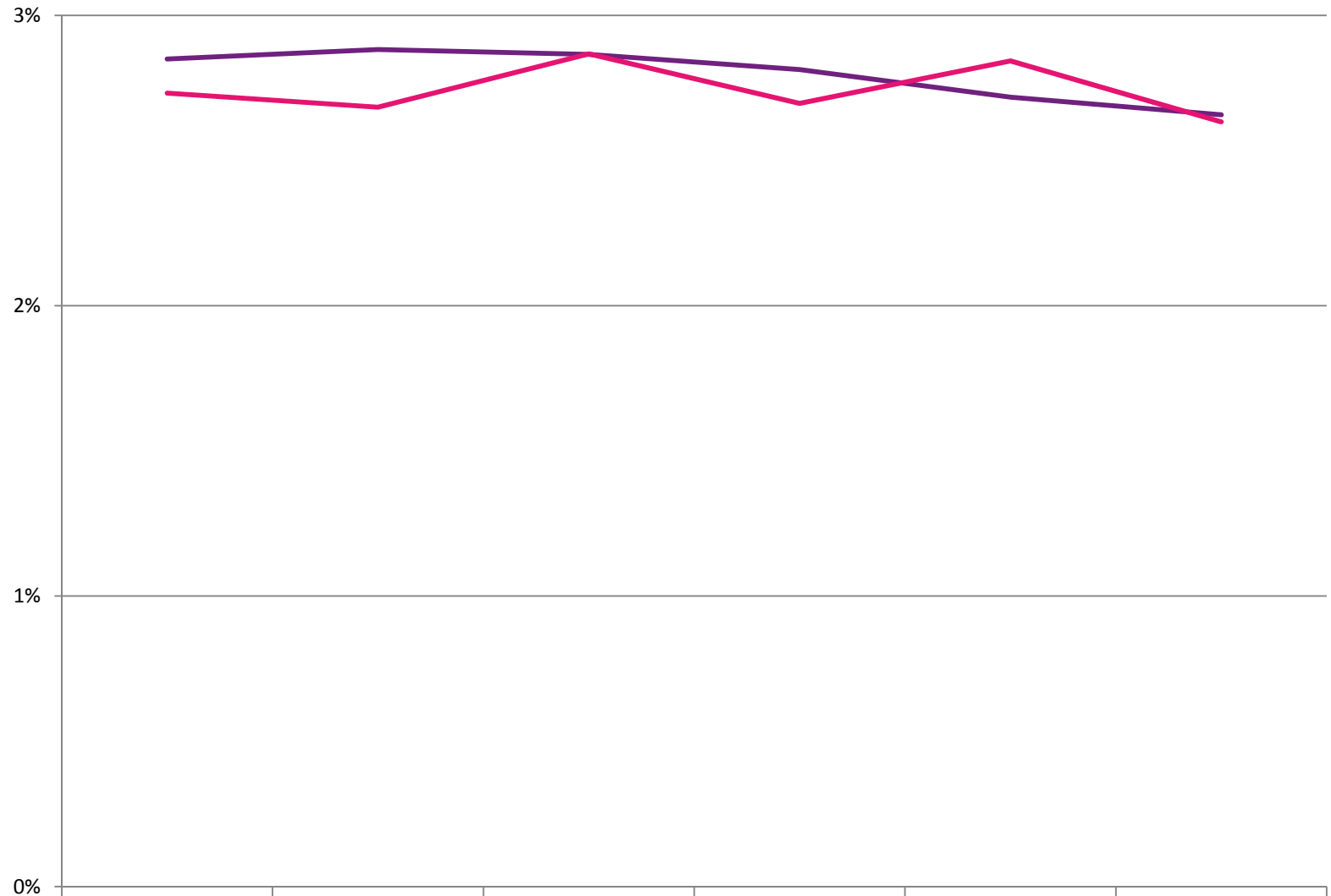
	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
VodafoneZiggo	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[45 - 50%]	[45 - 50%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

Op basis van vragen 30\_A1\_1\_1-2-3-4-5, 30\_A1\_2\_1-2-3-4-5, 30\_A1\_3\_1-2-3-4-5, 30\_A1\_4\_1-2-3-4-5, 30\_A1\_5\_1-2-3-4-5, en 30\_A1\_6\_1 van de Telecommonitor



# Broadband

## Retail churn based on connections

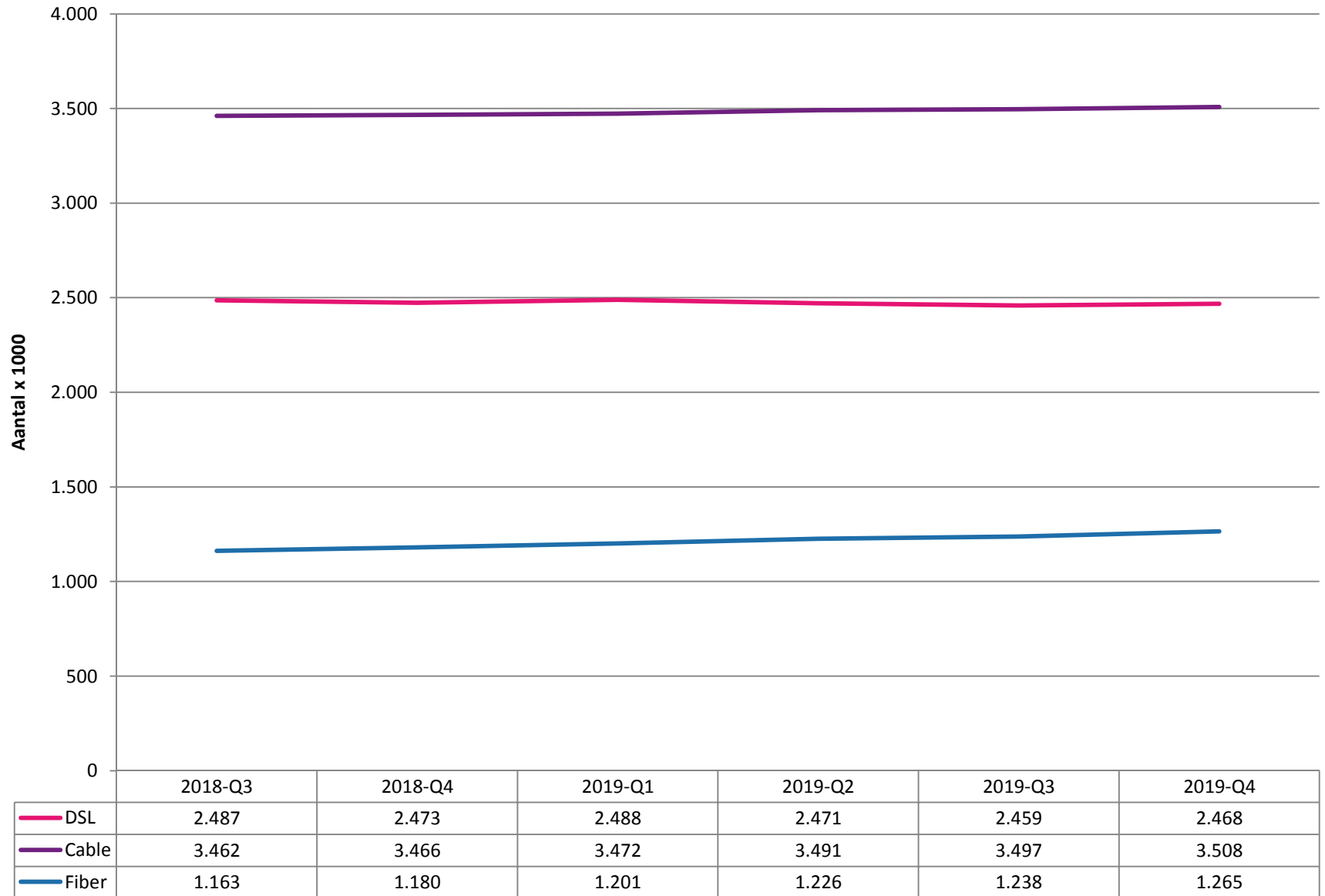


	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
— Adds	2,85%	2,88%	2,87%	2,81%	2,72%	2,66%
— Disconnects	2,73%	2,68%	2,87%	2,70%	2,84%	2,63%

Op basis van vragen 30\_A5\_1\_1-2, 30\_A5\_2\_1-2, 30\_A5\_3\_1-2, en 30\_A5\_4\_1-2 van de Telecommonitor

# Broadband

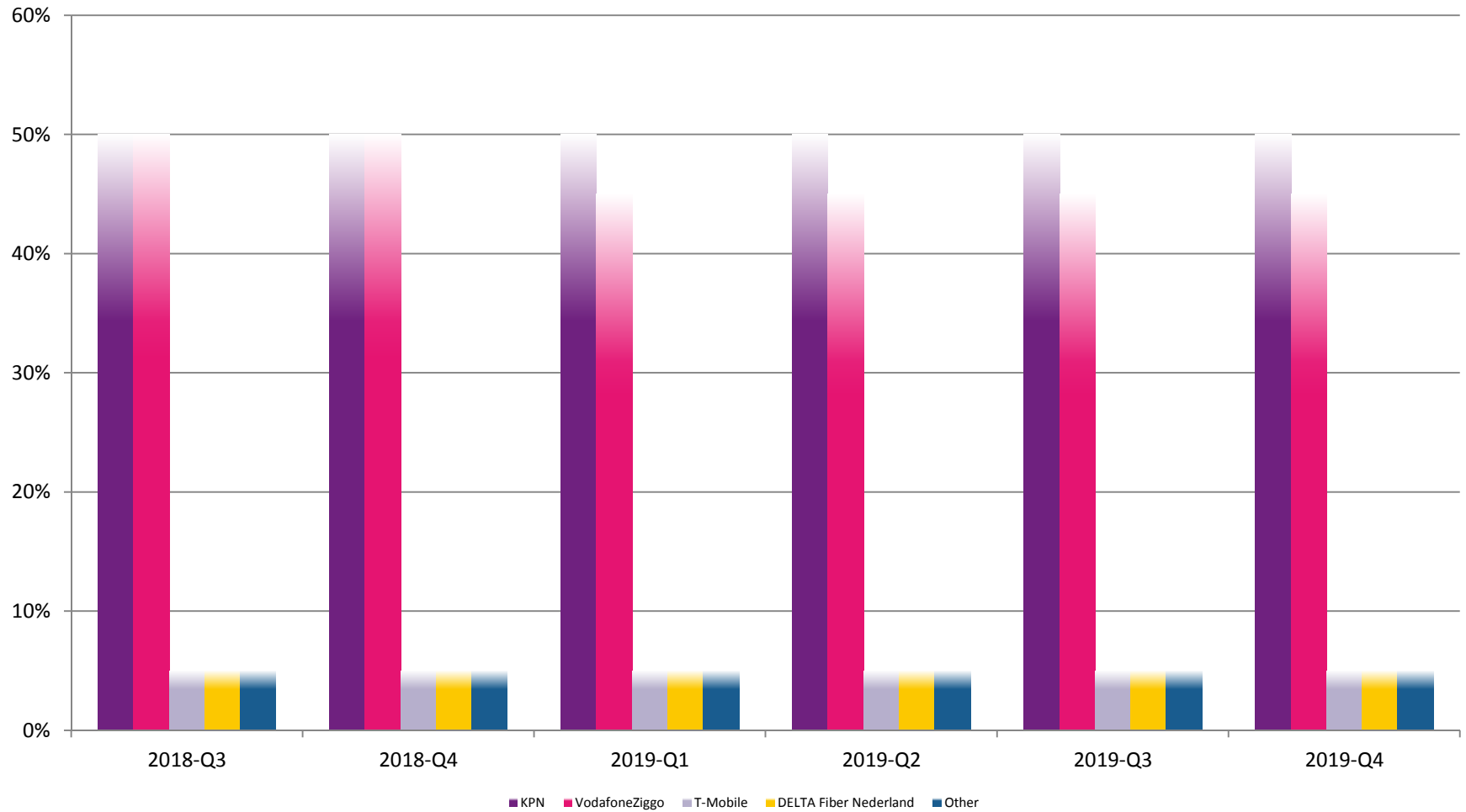
## Low-quality WBT-connections



Op basis van vragen 30\_B3\_1\_b-c-d-e en 30\_B3\_2\_1-2-3-4 van de Telecommonitor

# Broadband

## Market share based on low-quality WBT-connections

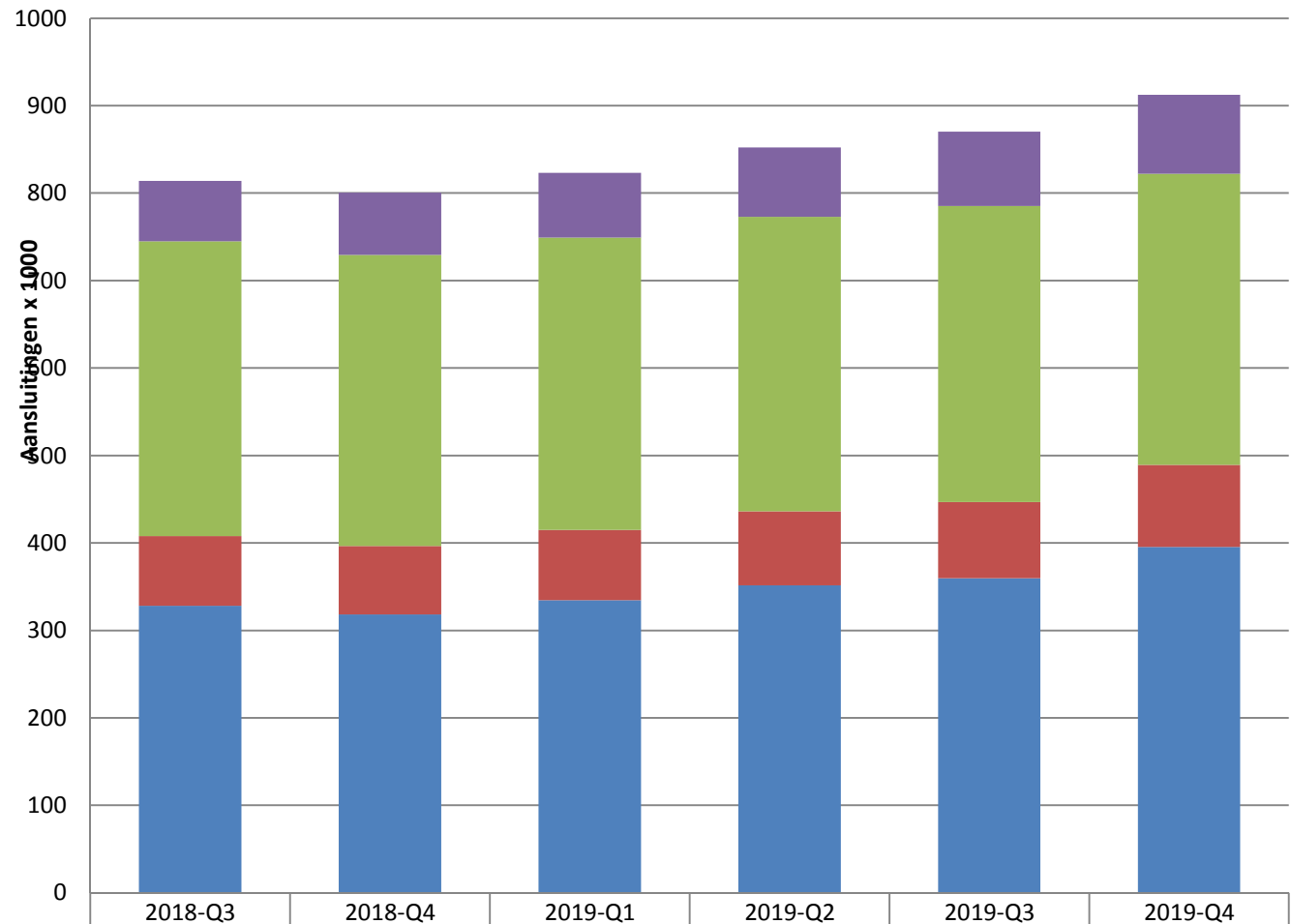


	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

Op basis van vragen 30\_B3\_1\_b-c-d-e en 30\_B3\_2\_1-2-3-4 van de Telecommonitor

# Broadband

## Unbundled access and external procurement of copper and fiber-optic (FttH) by alternative providers with KPN

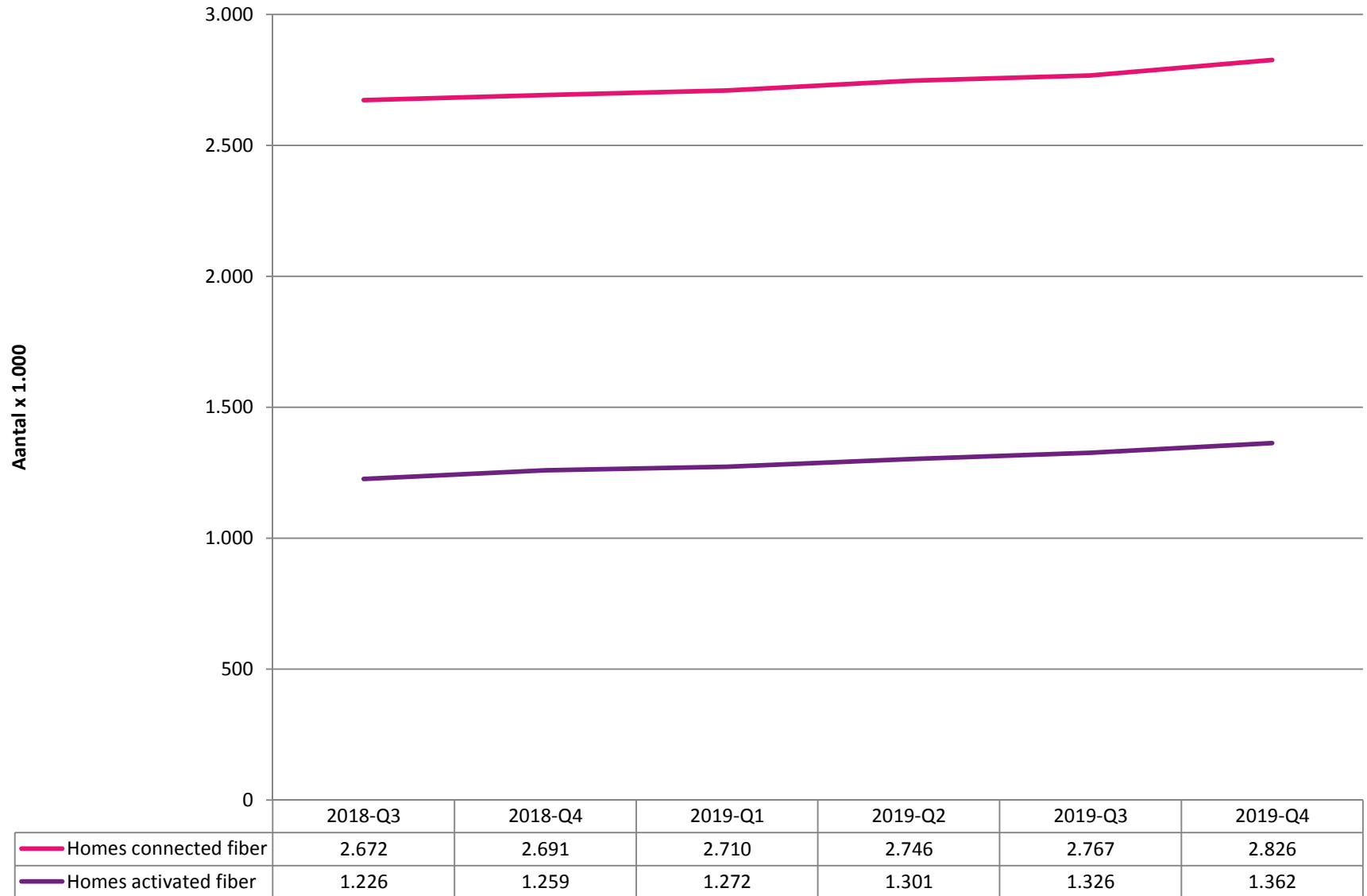


■ Unbundled Local Loop Fiber (FttH)	69	71	74	79	85	90
■ (Virtual) Unbundles Local Loop Copper	337	333	334	337	338	333
■ 0	80	78	80	84	87	94
■ 0	328	318	335	352	360	396

Op basis van vragen 30\_B1\_1\_b-c, 30\_B1\_2\_b-c, en 30\_B1\_3\_b van de Telecommonitor

# Broadband

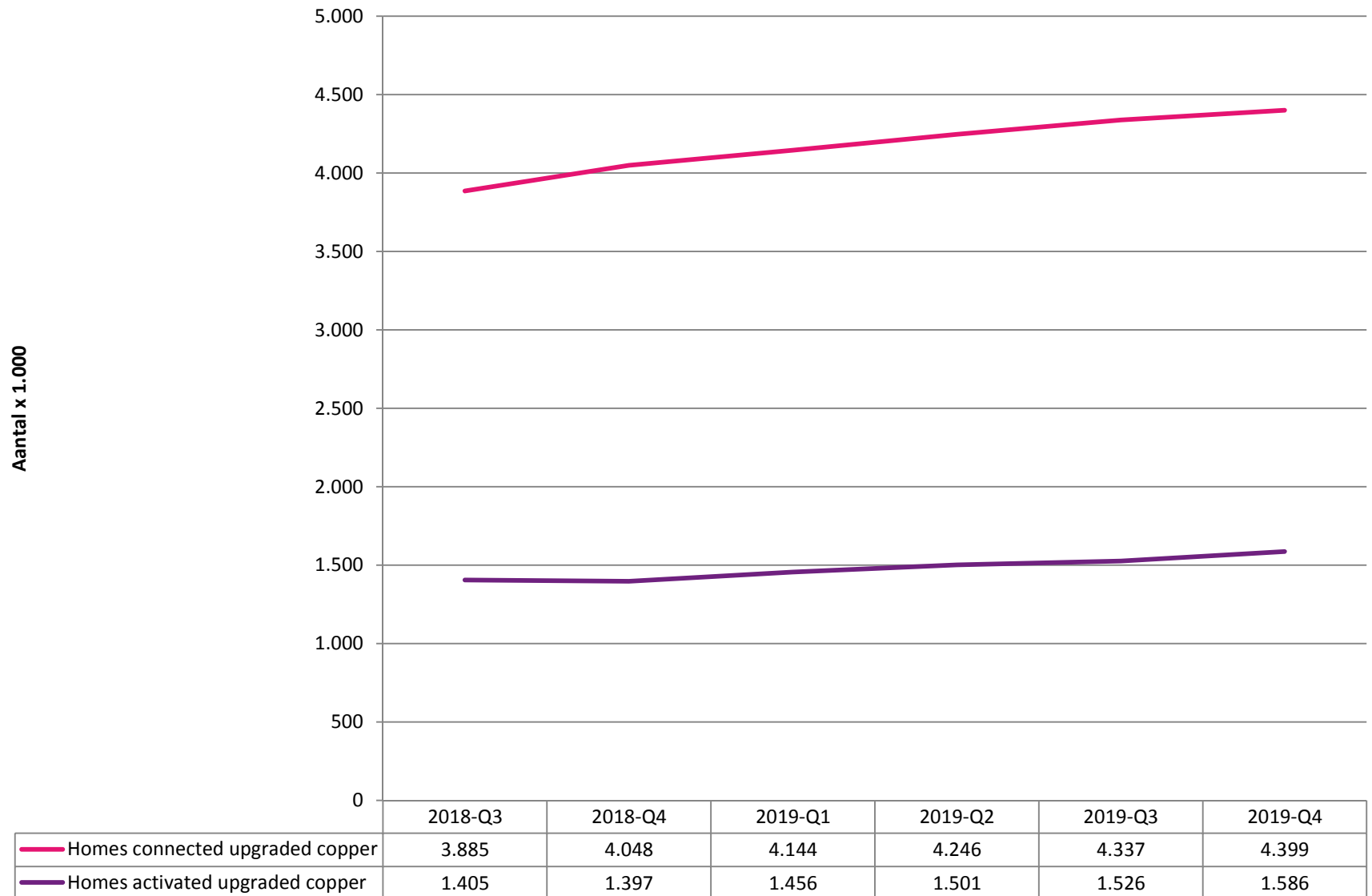
## Homes connected and activated (FttH)



Op basis van vragen 0\_A3\_1\_4 en 30\_A1\_4\_1-2-3-4-5 van de Telecommonitor

# Broadband

## Homes connected to upgraded copper



Op basis van vragen 0\_A3\_1\_4 en 30\_A1\_4\_1-2-3-4-5 van de Telecommonitor. Vanaf de straatkast (SDF) zijn hogere xDSL bandbreedte snelheden (tot 200Mbit/s) leverbaar dan via de wijkcentrale (MDF)

# Business network services

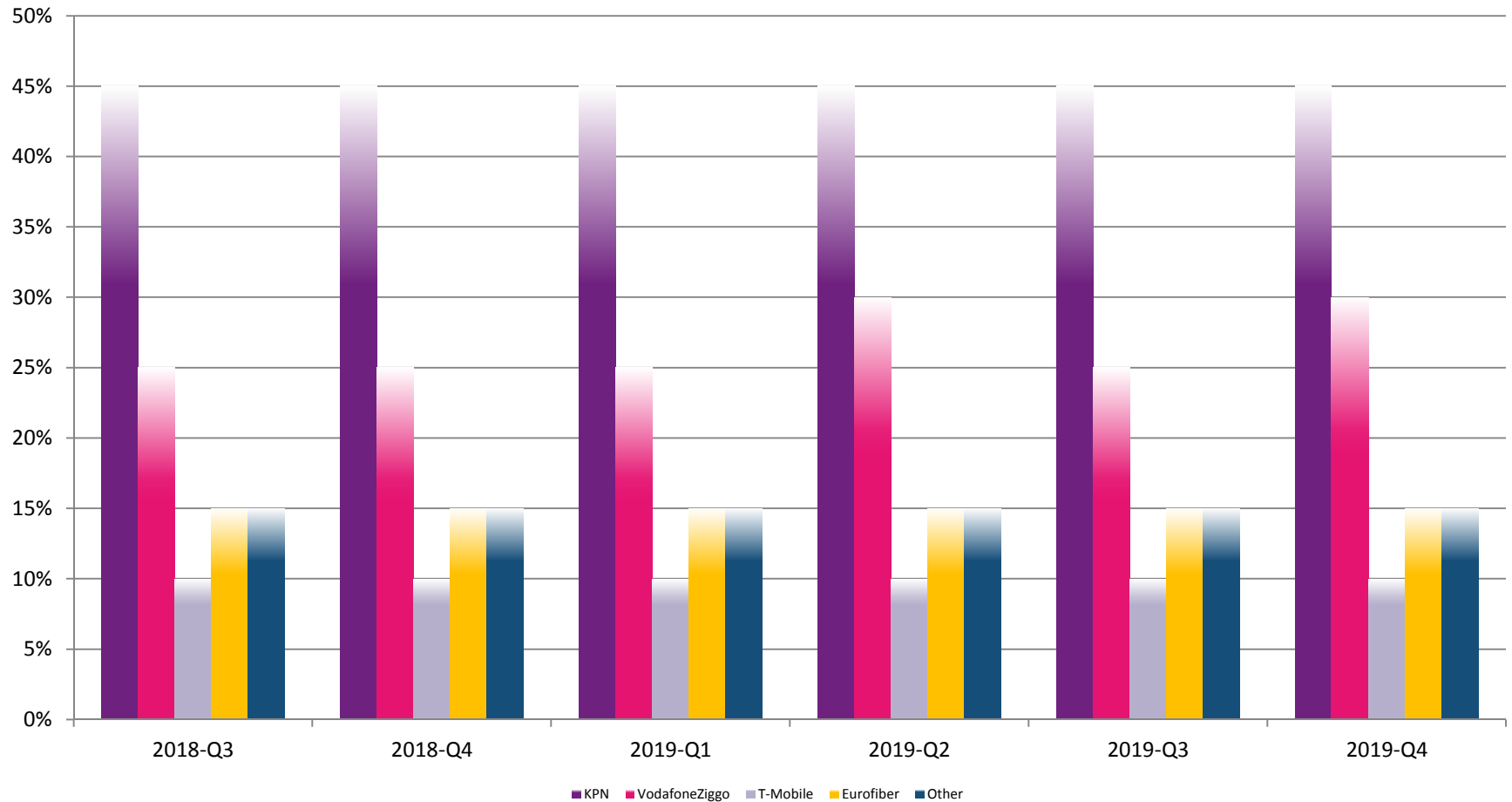
## Retail business fiber-optic connections



Op basis van vragen 30\_A2\_1\_1 van de Telecommonitor. Exclusief aansluitingen kleine en regionale marktpartijen

# Business network services

## Market share based on retail business fiber-optic connections



	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
VodafoneZiggo	[20 - 25%]	[20 - 25%]	[20 - 25%]	[25 - 30%]	[20 - 25%]	[25 - 30%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
Eurofiber	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]
Other	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]

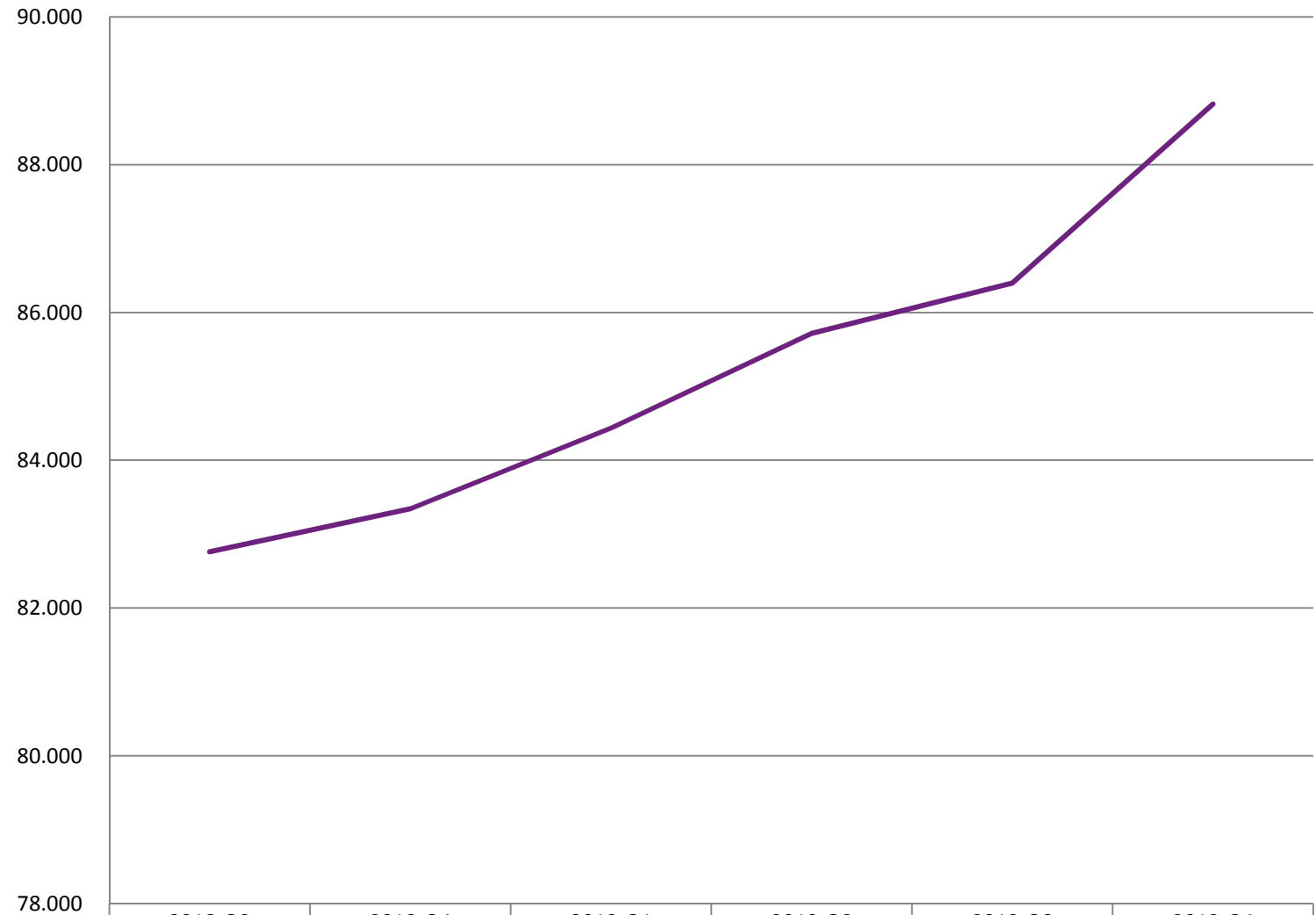
Op basis van vragen 30\_A2\_1\_1 van de Telecommonitor. Aansluitingen kleine en regionale marktpartijen wordt niet meegenomen in het berekenen van het marktaandeel



# Business network services

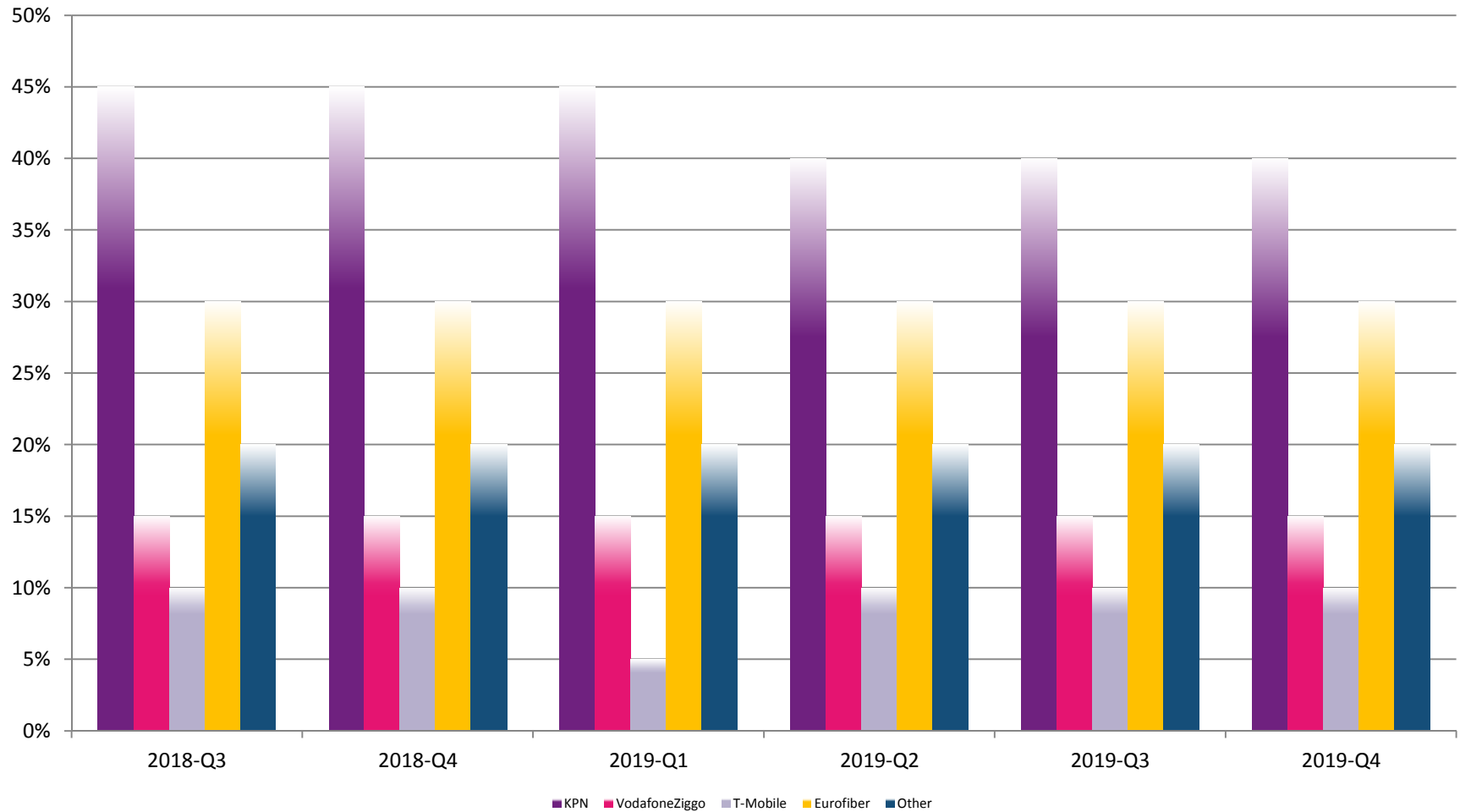
## Wholesale business fiber-optic connections

ODF (FtO) connections



# Business network services

## Wholesale market share based on business fiber-optic connections

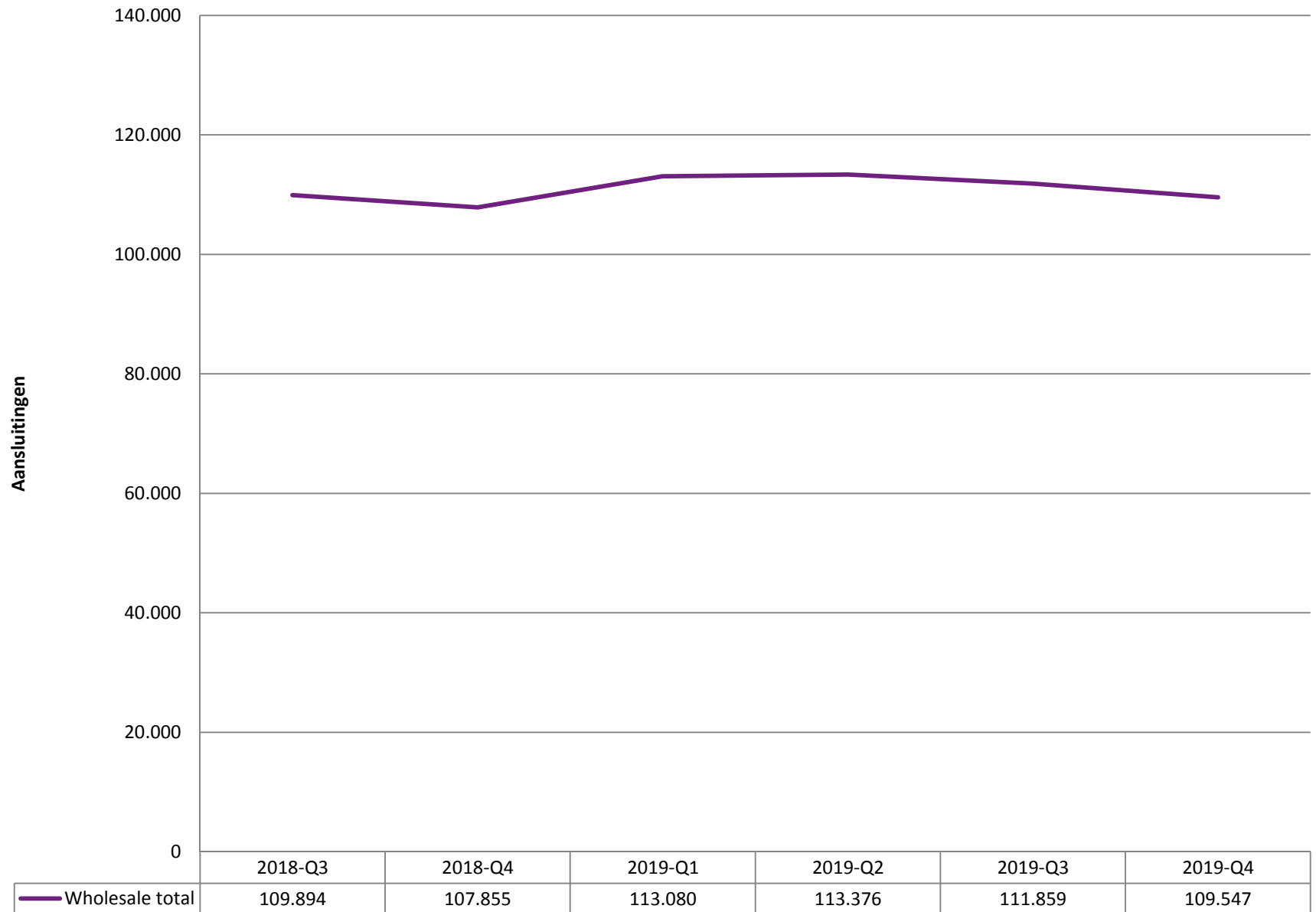


	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]	[10 - 15%]
T-Mobile	[5 - 10%]	[5 - 10%]	[0 - 5%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
Eurofiber	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
Other	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]

Op basis van vragen 30\_B4\_1\_1-3, 30\_B4\_8\_1, 30, 30\_A2\_1\_1-2, en 30\_A2\_4\_1 van de Telecommonitor. \*Marktaandeel kleine en regionale marktpartijen zijn geschat op 10% (zie marktanalyse ODF-Access (FttO))

# Business network services

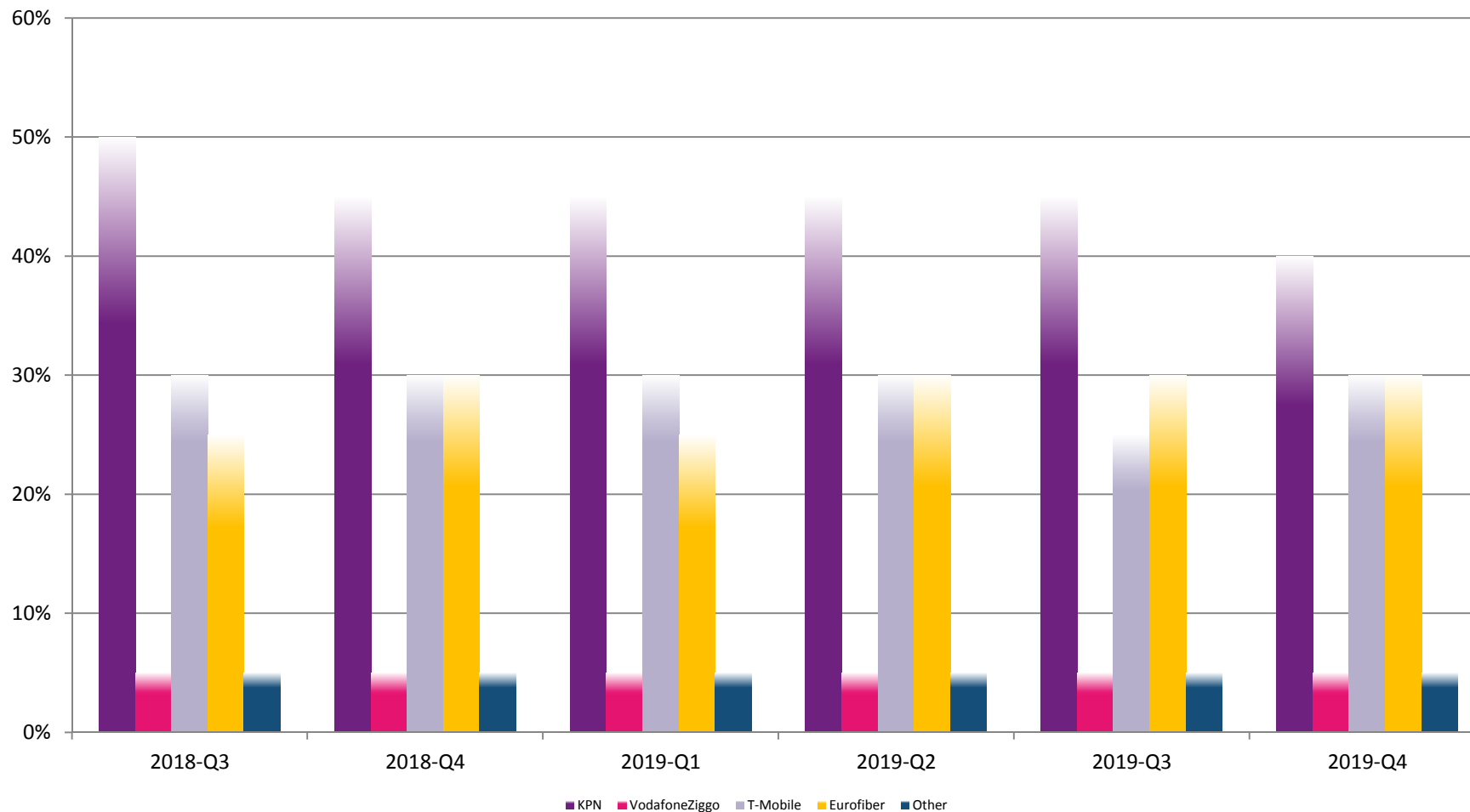
## Wholesale HKWBT and leased lines



Op basis van vragen 30\_A2\_4\_1, 30\_B2\_1\_b-c-d, 30\_B2\_2\_1-2-3, 30\_B4\_3\_b-c-d-e, 30\_B4\_4\_1-2-3-4, 30\_B4\_6\_b-c, 30\_B4\_7\_1-2 en 30\_B4\_8\_1 van de Telecommonitor. De cijfers zijn gebaseerd op de marktafbakening die volgt uit het marktanalysebesluit HKWBT/HL 2012.

# Business network services

## Wholesale market share of HKWBT and leased lines

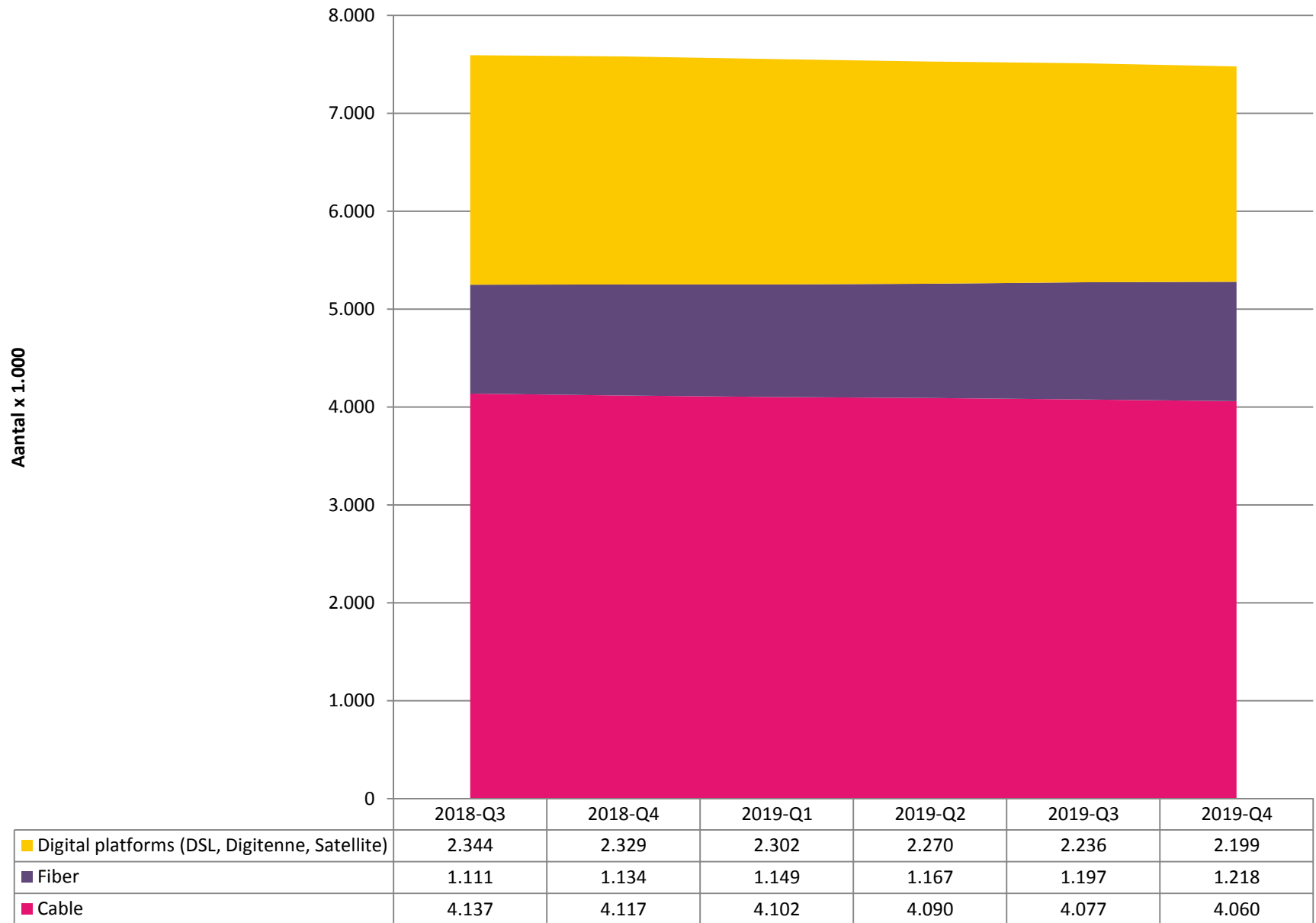


	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[45 - 50%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[35 - 40%]
VodafoneZiggo	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
T-Mobile	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[20 - 25%]	[25 - 30%]
Eurofiber	[20 - 25%]	[25 - 30%]	[20 - 25%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

Op basis van vragen 30\_A2\_4\_1, 30\_B2\_1\_b-c-d, 30\_B2\_2\_1-2-3, 30\_B4\_3\_b-c-d-e, 30\_B4\_4\_1-2-3-4, 30\_B4\_6\_b-c, 30\_B4\_7\_1-2 en 30\_B4\_8\_1 van de Telecommonitor. De cijfers zijn gebaseerd op de marktafbakening die volgt uit het marktanalysebesluit HKWBT/HL 2012

# Television

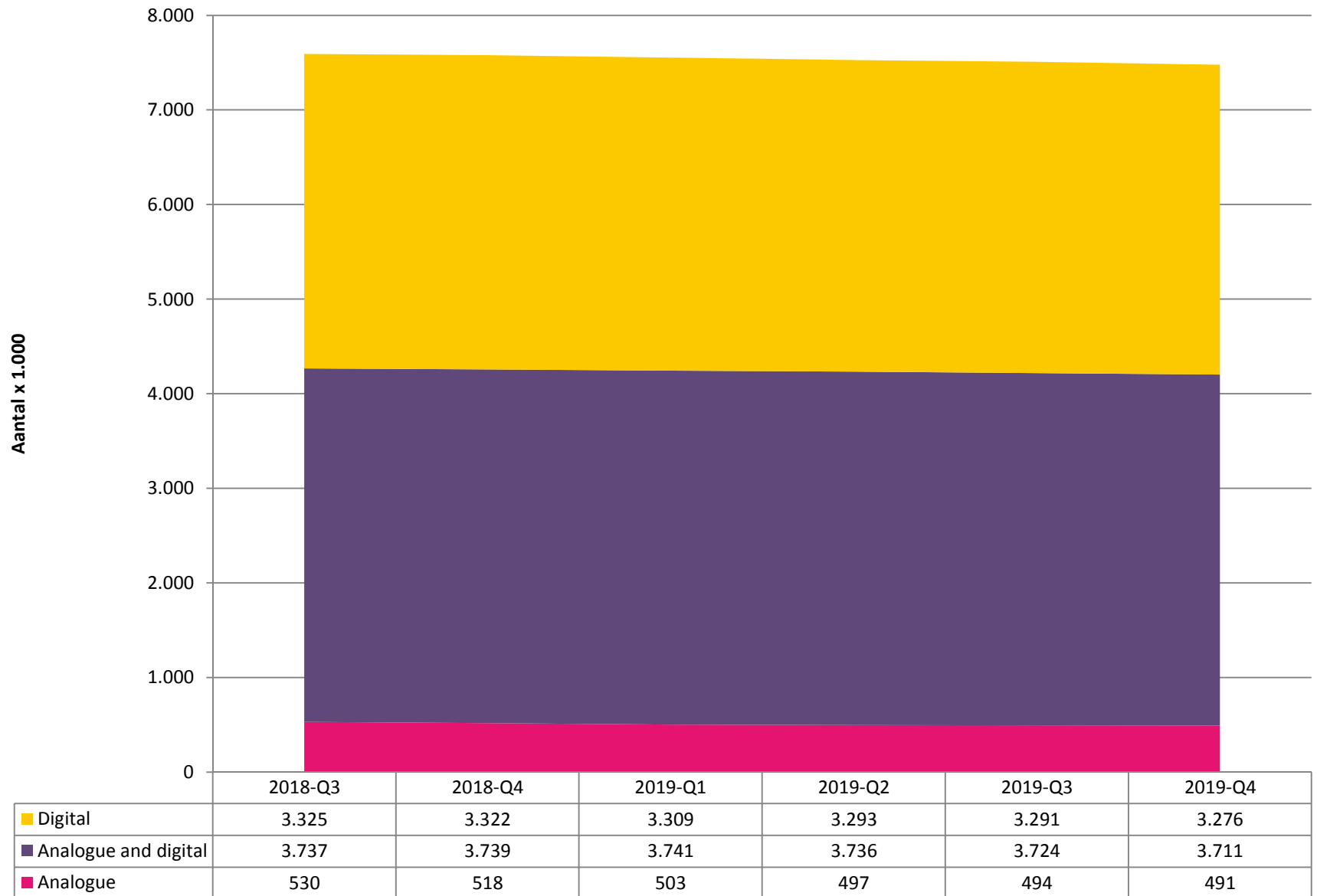
## Retail subscriptions per connection type



Op basis van vragen 40\_A1\_1\_1-2-3, 40\_A1\_2\_1-2, 40\_A1\_3\_1-2-3, en 40\_A1\_4\_1-2-3-4 van de Telecommonitor

# Television

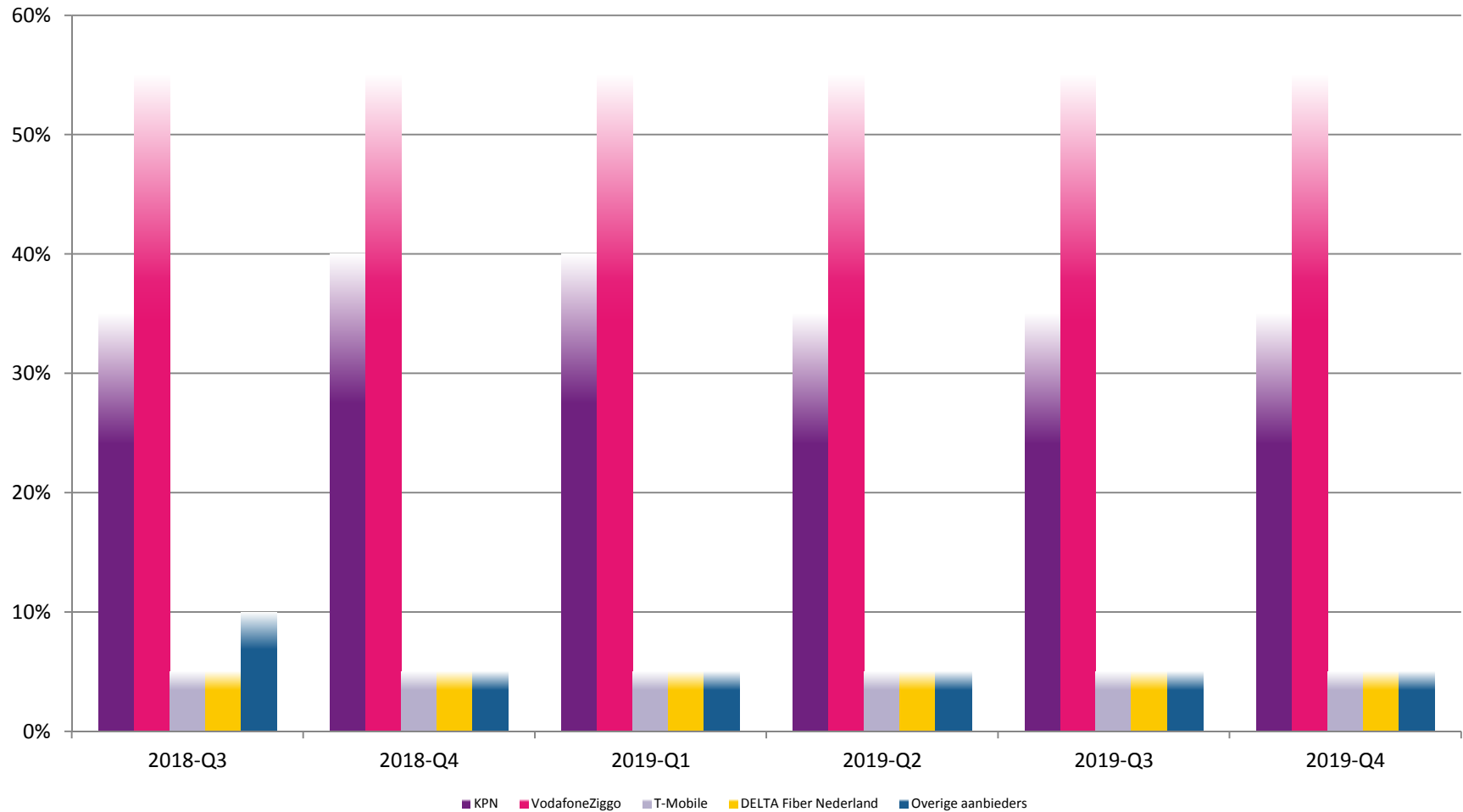
## Digitalization of television subscriptions



Op basis van vragen 40\_A1\_1\_1-2-3, 40\_A1\_2\_1-2, 40\_A1\_3\_1-2-3, en 40\_A1\_4\_1-2-3-4 van de Telecommonitor

# Television

## Retail market shares based on subscriptions

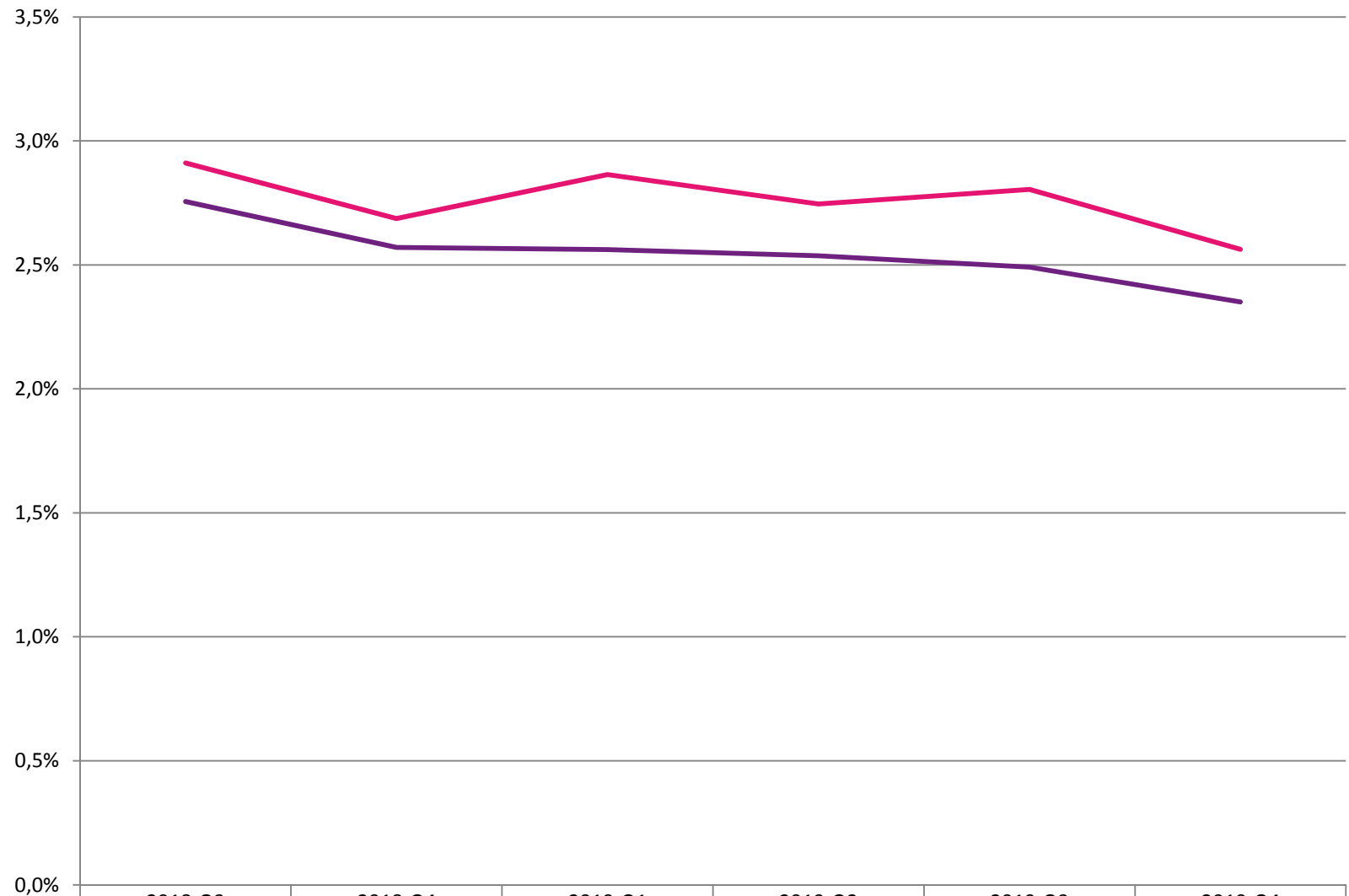


	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[30 - 35%]	[35 - 40%]	[35 - 40%]	[30 - 35%]	[30 - 35%]	[30 - 35%]
VodafoneZiggo	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]	[50 - 55%]
T-Mobile	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[5 - 10%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

Op basis van vragen 40\_A1\_1\_1-2-3, 40\_A1\_2\_1-2, 40\_A1\_3\_1-2-3, en 40\_A1\_4\_1-2-3-4 van de Telecommonitor

# Television

## Retail churn of television subscriptions

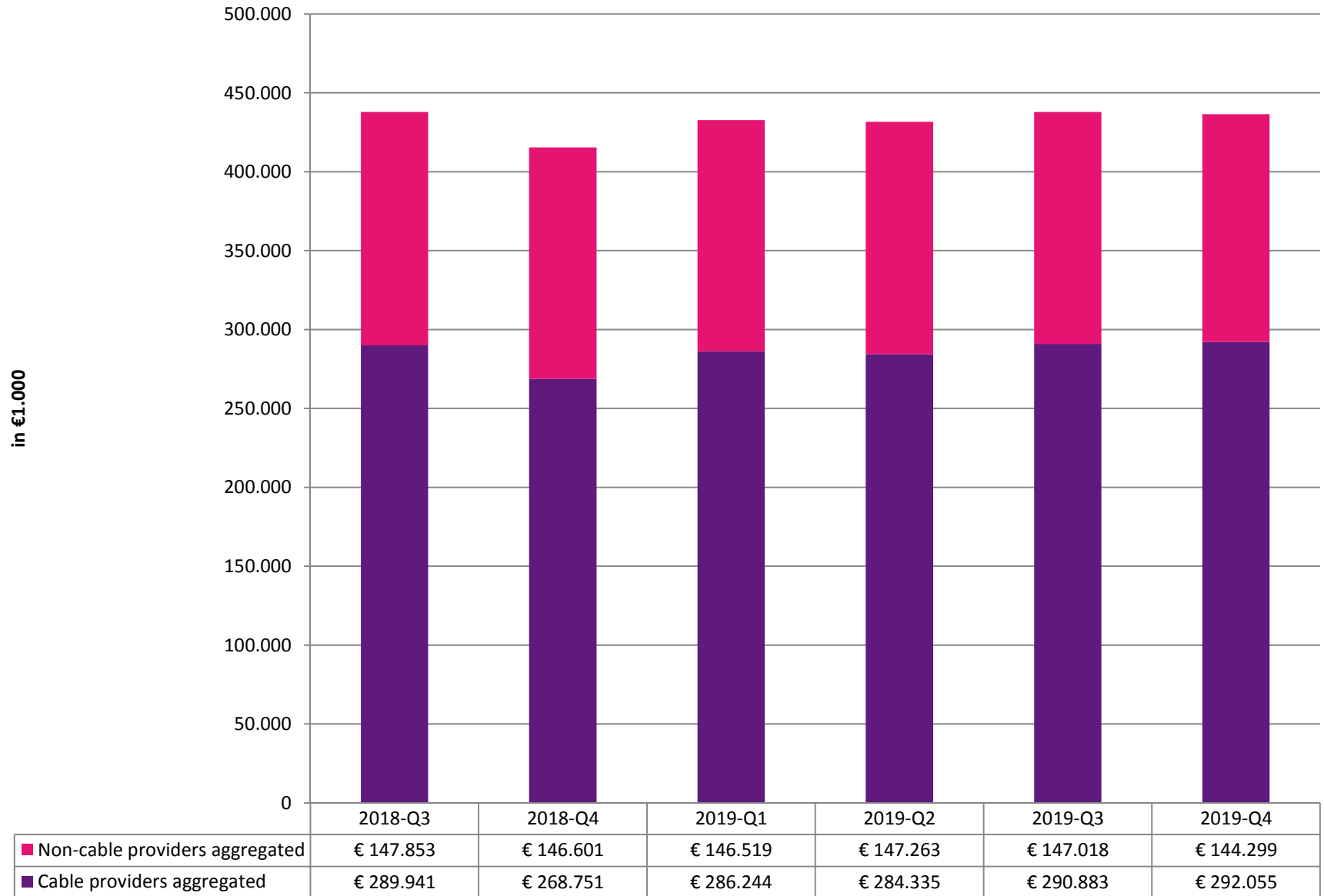


Op basis van vragen 40\_A2\_1\_1-2, 40\_A2\_2\_1-2, 40\_A2\_3\_1-2, 40\_A2\_4\_1-2, 40\_A2\_5\_1-2 en 40\_A2\_6\_1-2 van de Telecommonitor



# Television

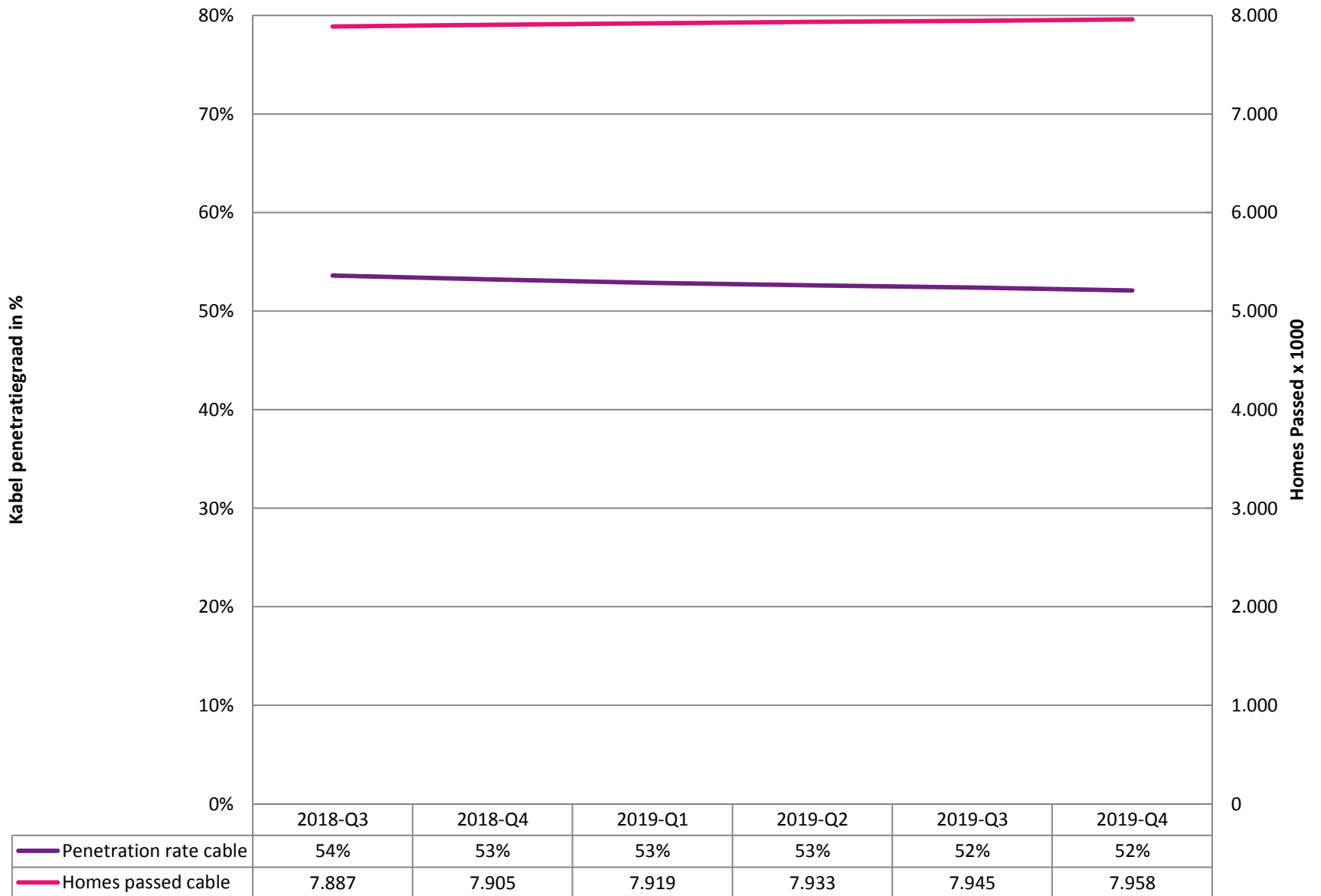
## Retail turnover of radio/tv subscriptions



Op basis van vragen 40\_A3\_1\_1-2-3, 40\_A3\_2\_1-2-3, 40\_A3\_3\_1-2, 40\_A2\_4\_1-2 en 40\_A2\_5\_1-2-3 van de Telecommonitor

# Television

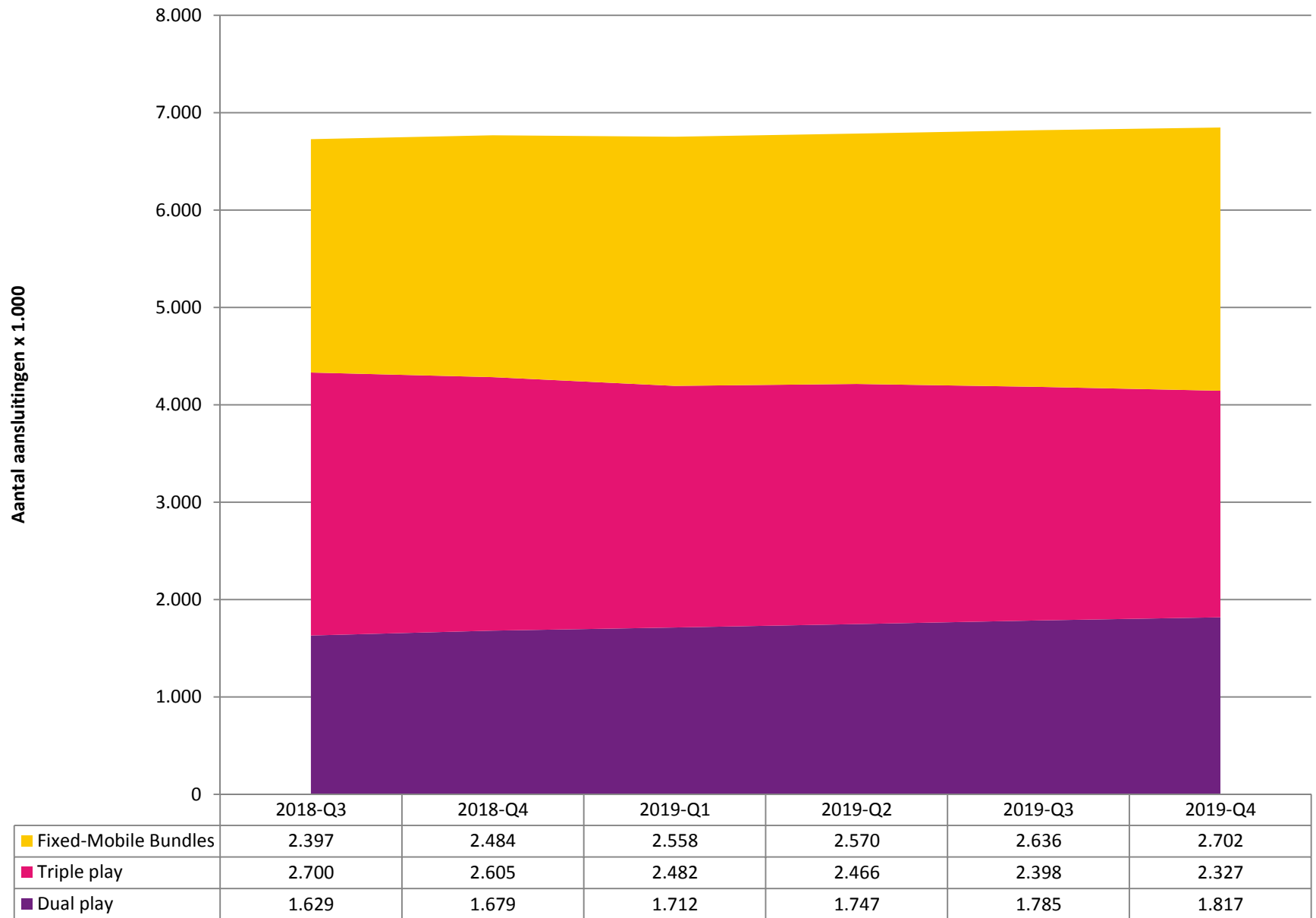
## Homes passed and cable penetration level



Op basis van vragen 40\_A1\_1\_1-2-3, 40\_A1\_2\_1-2, 40\_A1\_3\_1-2-3, en 40\_A1\_4\_1-2-3-4 van de Telecommonitor

# Bundles

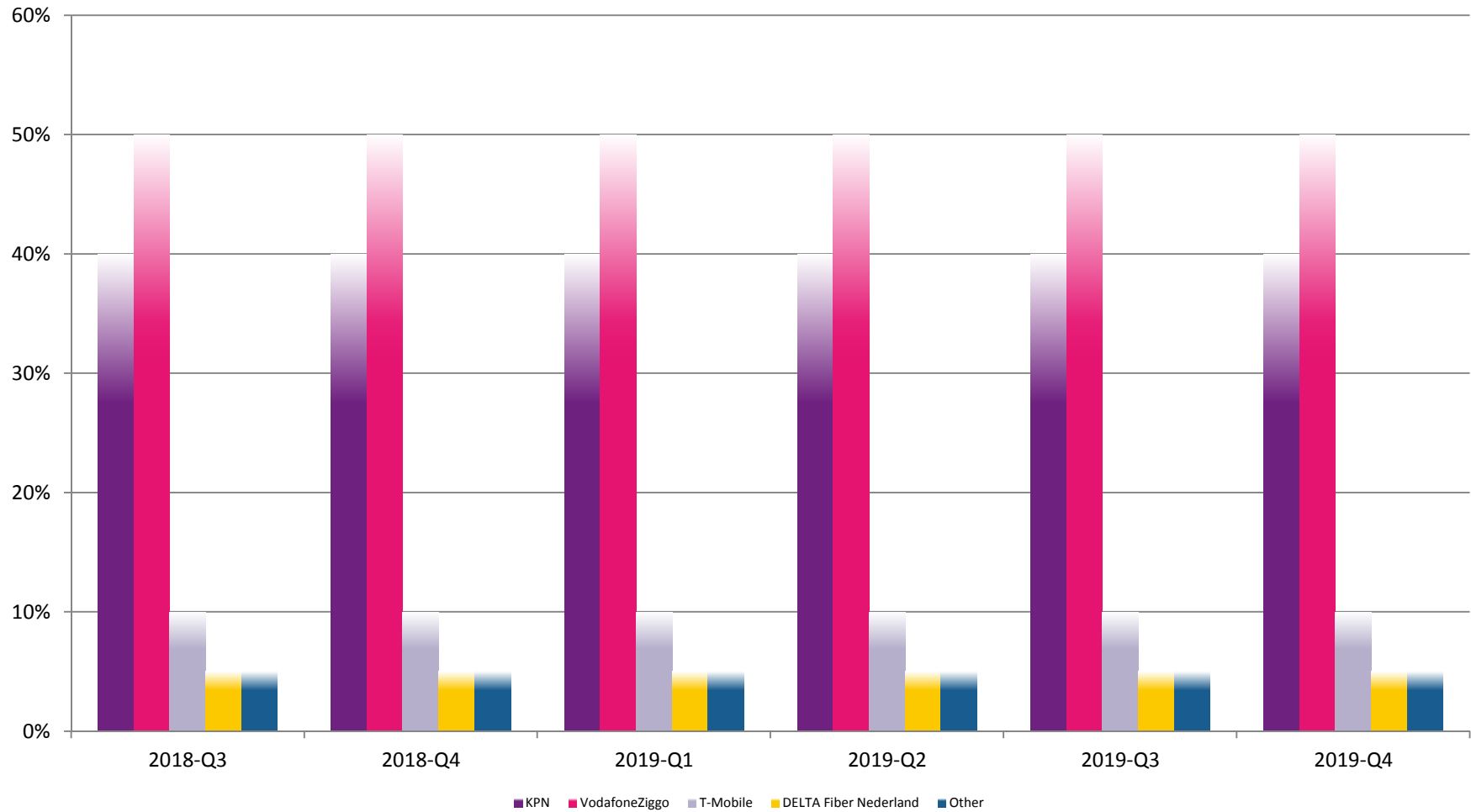
## Retail connections of bundles



Op basis van vragen 50\_A1\_1\_1-2-3-5-6, 50\_A1\_2\_1-2-3-4, en 50\_A1\_3\_1 van de Telecommonitor

# Bundles

## Retail market share of bundles



	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
KPN	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]	[35 - 40%]
VodafoneZiggo	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
T-Mobile	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
DELTA Fiber Nederland	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
Other	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

Op basis van vragen 50\_A1\_1\_1-2-3-4-5-6, 50\_A1\_2\_1-1-2-3-4, en 50\_A1\_3\_1 van de Telecommonitor

# Bundles

## Retail connections with broadband



	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
■ Broadband in Fixed-Mobile	24%	24%	24%	24%	25%	25%
■ Broadband in triple play	44%	44%	43%	42%	42%	41%
■ Broadband in dual play	23%	24%	24%	24%	25%	25%
■ Broadband only	9%	9%	9%	9%	8%	8%

Op basis van vragen 30\_A1\_1\_1-2-3-4-5, 30\_A1\_2\_1-2-3-4-5, 30\_A1\_3\_1-2-3-4-5, 30\_A1\_4\_1-2-3-4-5, 30\_A1\_5\_1-2-3-4-5, 50\_A1\_1\_1-4-5, 50\_A1\_2\_1-2-4, en 50\_A1\_3\_1 van de Telecommonitor

# Bundles

## Retail connections with television



	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
■ TV in Fixed-Mobile	22%	23%	23%	23%	24%	24%
■ TV in triple play	40%	40%	39%	39%	39%	39%
■ TV in dual play	16%	16%	17%	18%	18%	19%
■ TV only	22%	21%	21%	20%	19%	18%

Op basis van vragen 40\_A1\_1\_1-2-3, 40\_A1\_2\_1-2, 40\_A1\_3\_1-2-3, 40\_A1\_4\_1-2-3-4, 50\_A1\_1\_1-2-3, 50\_A1\_2\_1-3, en 50\_A1\_3\_1 van de Telecommonitor

# Bundles

## Retail connections with fixed telephony



	2018-Q3	2018-Q4	2019-Q1	2019-Q2	2019-Q3	2019-Q4
■ Fixed telephony in Fixed-Mobile	29%	30%	31%	32%	33%	34%
■ Fixed telephony in triple play	47%	46%	45%	45%	44%	44%
■ Fixed telephony in dual play	7%	7%	7%	7%	7%	6%
■ Fixed telephony only	17%	18%	18%	16%	17%	16%

Op basis van vragen 20\_A1\_1\_1-2-3-4-5-6, 20\_A1\_7\_1-2-3-4-5, 50\_A1\_1\_2-4-6, 50\_A1\_2\_1-3-4, en 50\_A1\_3\_1 van de Telecommonitor

# Interviewed market participants

Data is provided per market by the below market participants

Algemeen		Mobiel	Vaste telefonie	
AT&T	MTTM	KPN	AT&T	T-Mobile
BT	Pretium	T-Mobile	BT	Verizon
CAIW	Stipte	VodafoneZiggo	CAIW	VodafoneZiggo
CanalDigitaal	Tele2	Tele2	CanalDigitaal	
CIF	T-Mobile		Colt	
Cogas	Verizon		Delta	
Colt	VodafoneZiggo		KPN	
Delta			MTTM	
Easynet			Pretium	
Eurofiber			Stipte	
KPN			Tele2	
Breedband en netwerkdiensten		Televisie	Bundels	
AT&T	KPN	CAIW	CAIW	VodafoneZiggo
BT	Tele2	CanalDigitaal	CanalDigitaal	
CAIW	T-Mobile	Cogas	Cogas	
CanalDigitaal	Verizon	Delta	Delta	
Colt	VodafoneZiggo	KPN	KPN	
Delta		Tele2	Stipte	
Easynet		T-Mobile	Tele2	
Eurofiber		VodafoneZiggo	T-Mobile	

