



Q3 2019

# Quarterly Market Indicators

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## Market Indicators Snapshot for Q3 2019

Mobile subscribers:  
2,041,662  
Penetration:  
136%

Average Usage  
per month:  
215 minutes




Fixed-telephony  
subscribers:  
226,347  
Penetration:  
15%

Average Domestic  
Minutes per  
quarter:  
120 minutes



2.33 Million  
broadband subscribers

155%  
Broadband Penetration Rate



Mobile Prepaid subscribers:  
1,383,475

% of Prepaid of Mobile Market:  
67.76%



Fixed Wired Telephony Subscribers:  
87%

Fixed Wireless subscribers:  
13%

172 Petabyte  
Total Data Traffic


Avg. Traffic per  
subscription per  
month:  
25 GB

99 Petabyte  
Fixed Broadband Traffic

Avg. Fixed Traffic per  
month:  
164 GB


73 Petabyte  
Mobile Broadband  
Traffic

Avg. Mobile Traffic per  
month:  
11 GB



Mobile Postpaid subscribers:  
658,187


% of Postpaid of Mobile Market:  
32.24%



International Outgoing minutes:

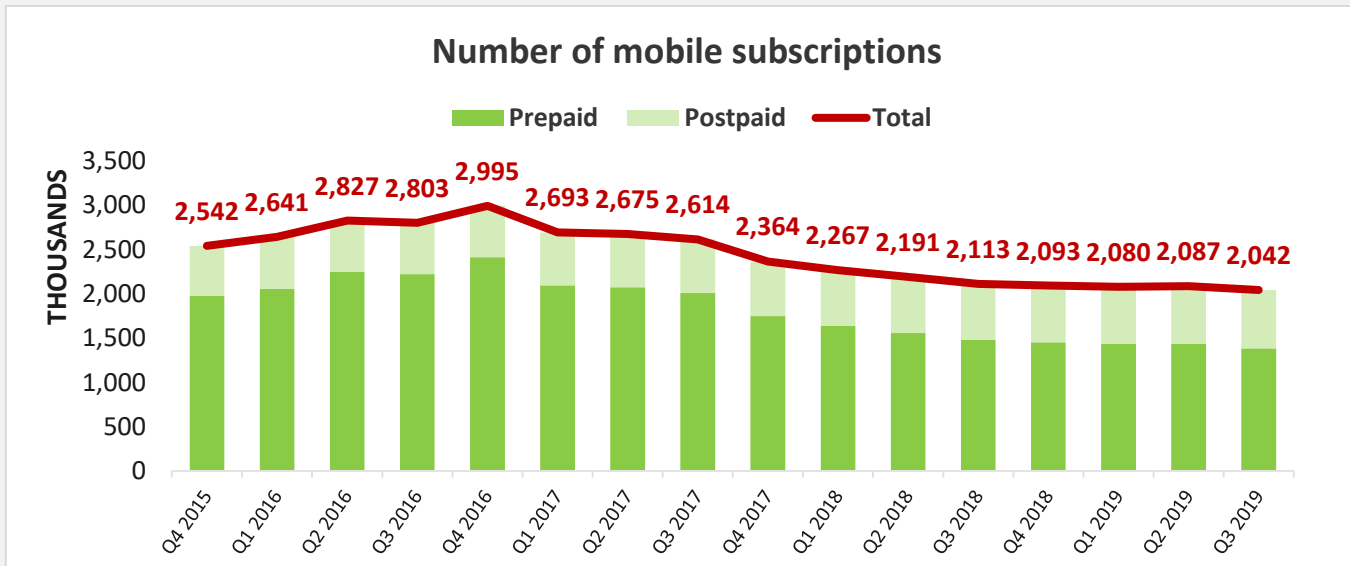
From mobile: 378.8 Million

From fixed telephony: 1.3 Million



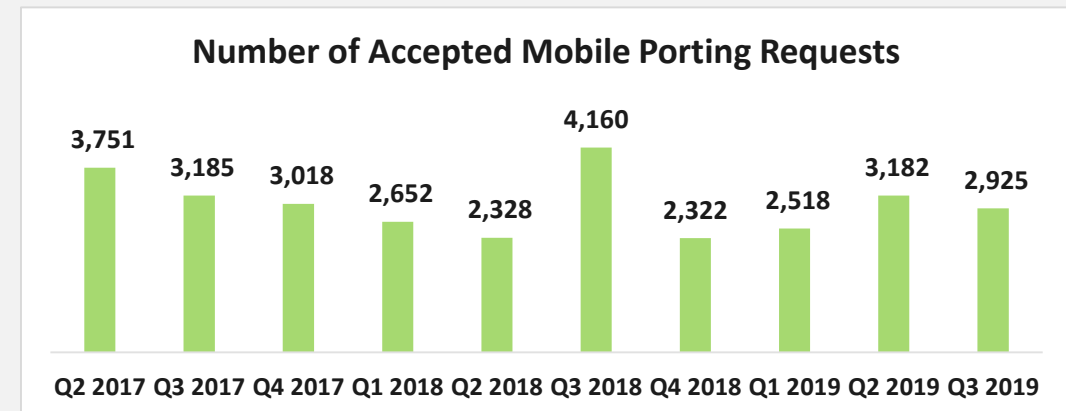
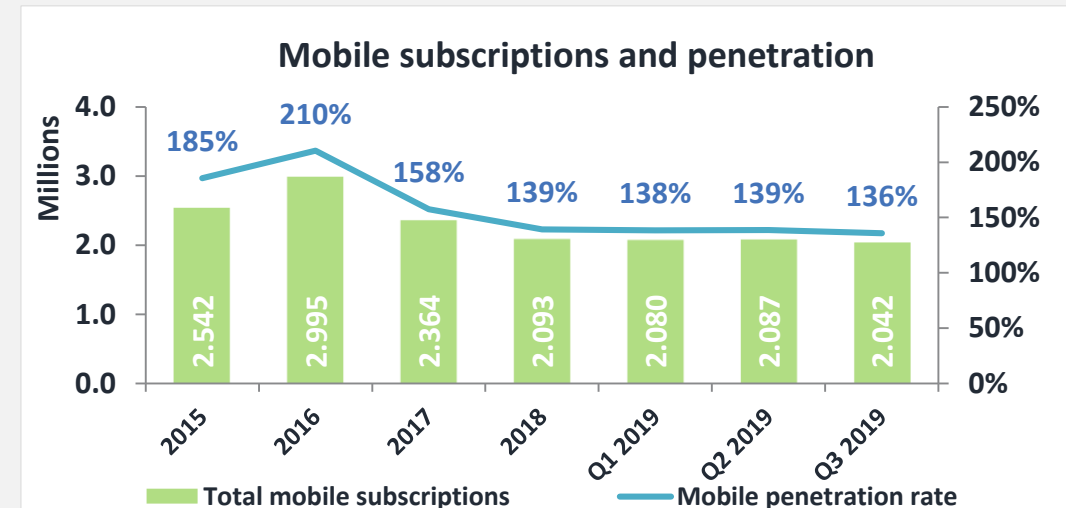
# Mobile services: Subscriptions

- The growth trend in mobile postpaid subscriptions continued as postpaid subscribers increased from 639,209 at the end of 2018 to 658,187 at the end of Q3 2019, a **3%** increase.
- On the other hand, mobile prepaid subscriptions is declining from 1,453,505 at the end of 2018 to 1,383,475 at the end of Q3 2019, a **5%** decline.
- Overall, Total subscriptions decreased slightly since the beginning of 2019 and penetration rates are also slightly declining over the period.
- Number of accepted ported mobile lines dropped from 3,182 to 2,925 in Q3 2019.



**Number of Mobile subscriptions (End of Q3 2019)**  
**2,041,662** Subscribers  
 136% Penetration rate

	2016	2017	2018	Q3 2019
Total	2,994,865	2,364,477	2,092,714	2,041,662
% of Prepaid	80.60%	73.94%	69.46%	67.76%
% of Postpaid	19.40%	26.06%	30.54%	32.24%

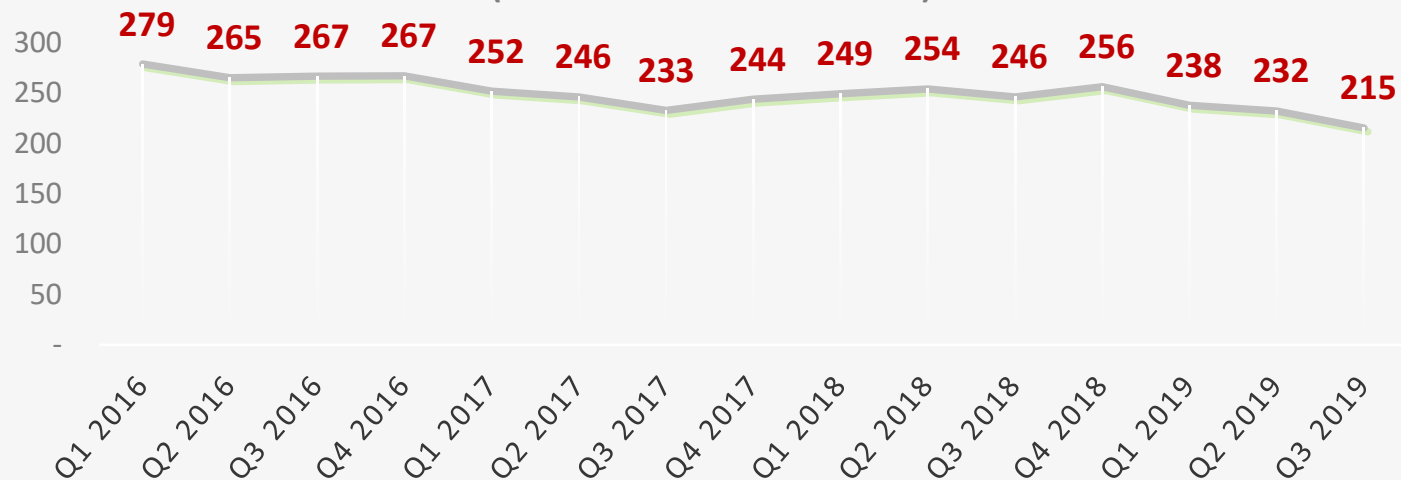


Population	2015	2016	2017	2018	Q3 2019
By IGA	1,370,322	1,423,726	1,501,116	1,503,091	1,503,092

# Mobile services: Traffic (Minutes)

- Between Q3 2018 & Q3 2019, total mobile outgoing minutes decreased by **15.2%**.
- Domestic mobile prepaid outgoing minutes declined by **21%** while domestic mobile postpaid minutes declined by **6%**. Overall, total domestic minutes declined by **14.15%**.
- For mobile international outgoing minutes, prepaid minutes declined by **17.6%** while postpaid minutes declined by **20%**. Overall, mobile International outgoing minutes declined by **17.7%**.
- Average monthly minutes per user decreased to **215** minutes. That number comprises average domestic monthly minutes per subscribers of **154** and average international monthly minutes by subscriber of **61**.

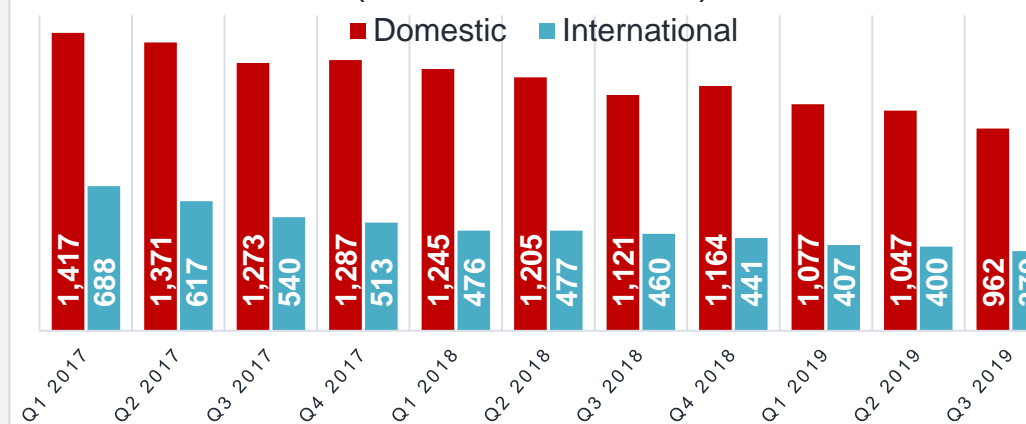
Average Monthly Minutes Per User  
(Domestic-International)



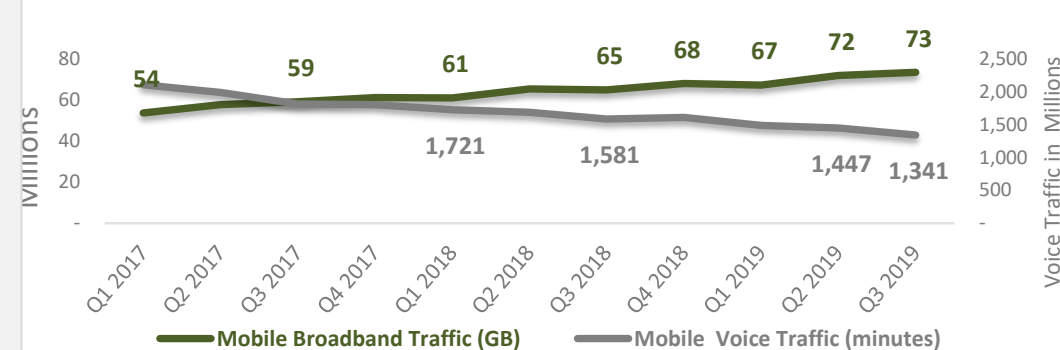
## Total Outgoing Traffic in Minutes (Domestic + International)\*

Q3 2018	Q3 2019	Change
1,580,872,958	1,340,872,022	15.2% ▼

Total Outgoing Mobile Voice Traffic in Millions of Minutes  
(Domestic-International)



Mobile Voice Traffic Vs Mobile Broadband Data Traffic



\* Revised for 2019 data

# Fixed telephony services: Subscriptions (PSTN & Wireless)

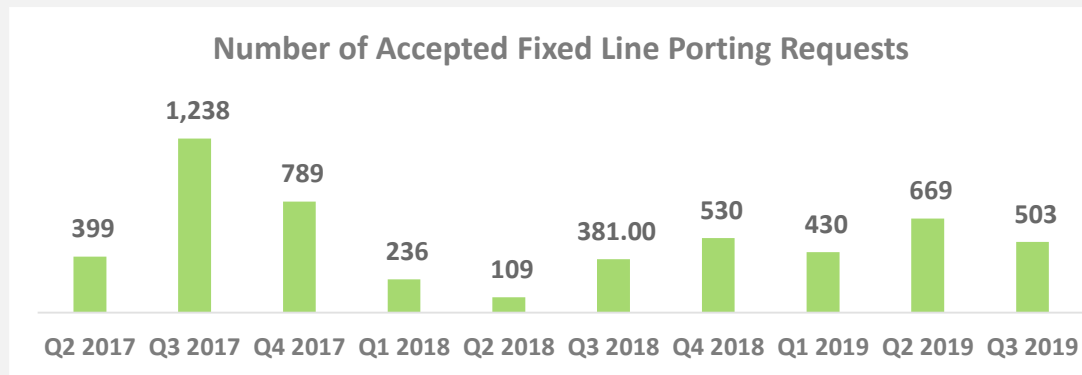
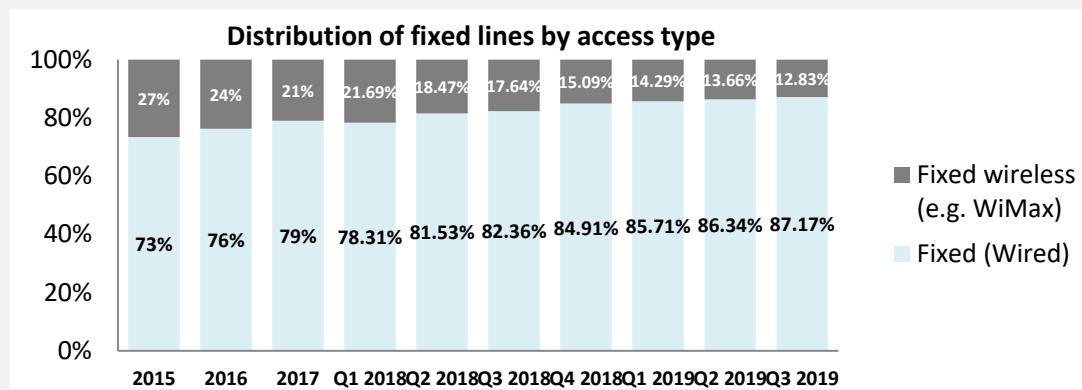
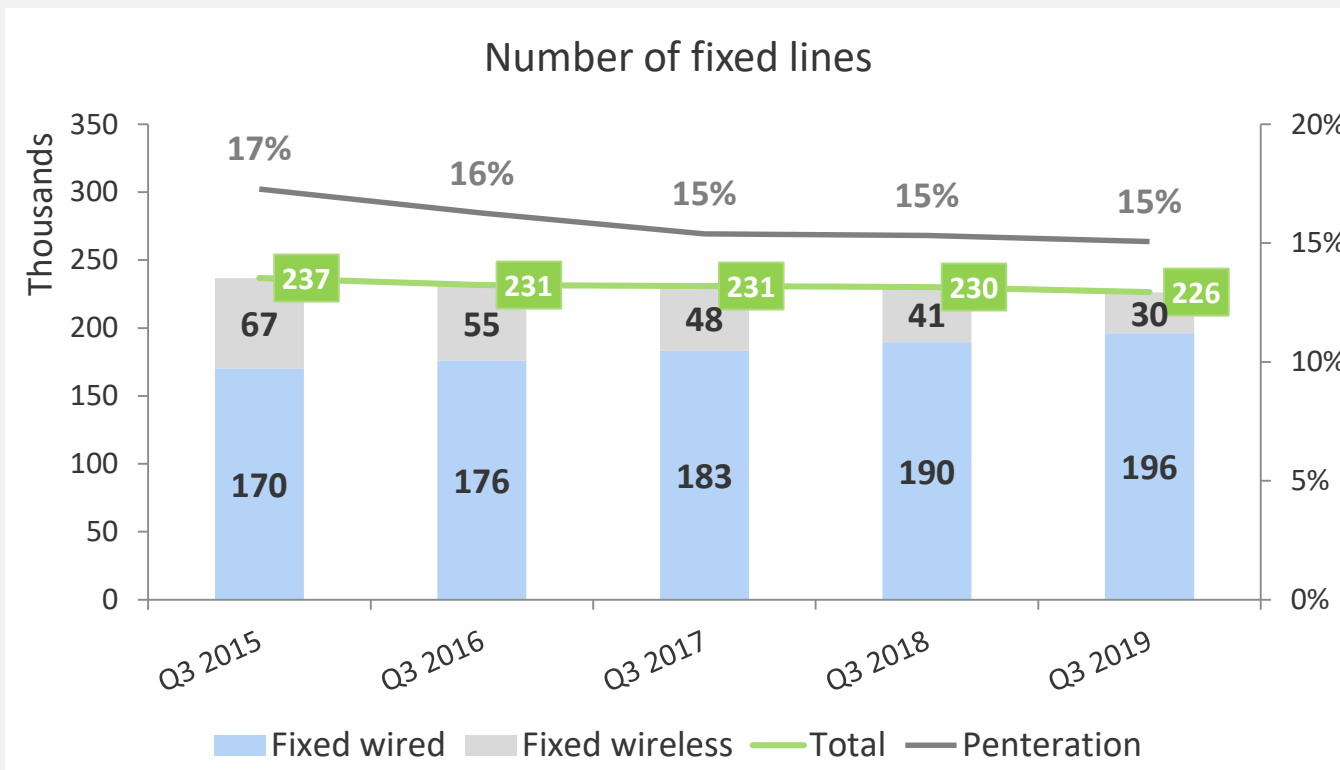
- Since the beginning of 2019, fixed telephony subscriptions dropped by **0.1%**. Fixed wired subscriptions increased by **1.6%** while fixed wireless subscriptions decreased by **10.3%**.
- Number of ported fixed lines dropped from 669 lines in Q2 2019 to 503 lines in Q3 2019.



## No. of fixed telephony subscriptions

End of Q3 2018	End of Q3 2019
<b>230,182</b>	<b>226,347</b>
15% Penetration rate	15% Penetration rate

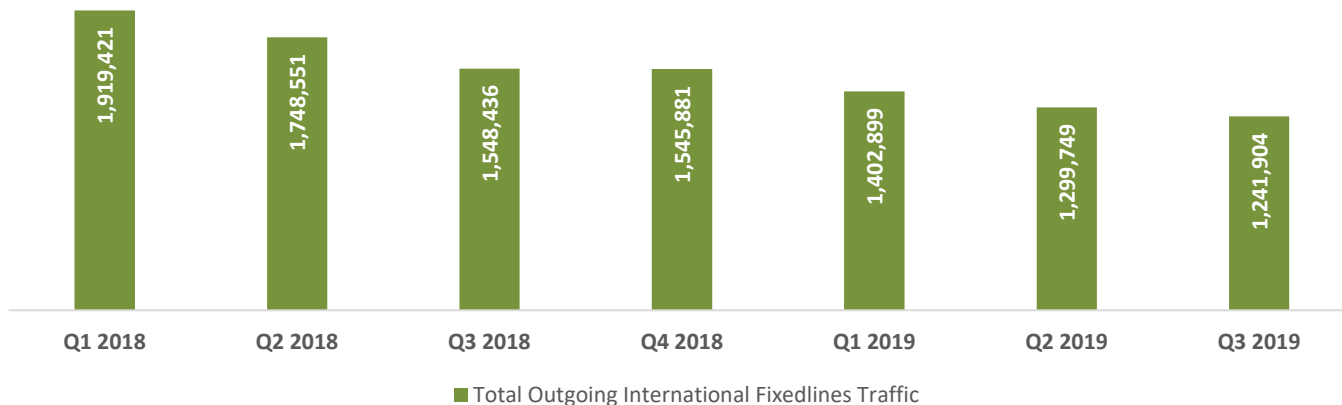
	2016	2017	2018	Q3 2019
<b>Total</b>	<b>233,917</b>	<b>234,709</b>	<b>225,479</b>	<b>226,347</b>
% of Fixed Wired	76.26%	79.01%	84.91%	87.17%
% of Fixed Wireless	23.74%	20.99%	15.09%	12.83%



# Fixed telephony services: Traffic (PSTN & Wireless - Minutes)

- Overall, fixed telephony domestic traffic has been stable over the last 7 quarters.
- However, fixed telephony international traffic has decreased by **19.8%** over the period between Q3 2018 & Q3 2019.
- Average monthly outgoing domestic minutes per subscriber went down to **122** while average monthly international minutes decreased to **5** minutes per subscriber.

Total Outgoing International Fixed-lines Traffic\*



\* International Outgoing Minutes originated from ISDN traffic is not included in the chart above

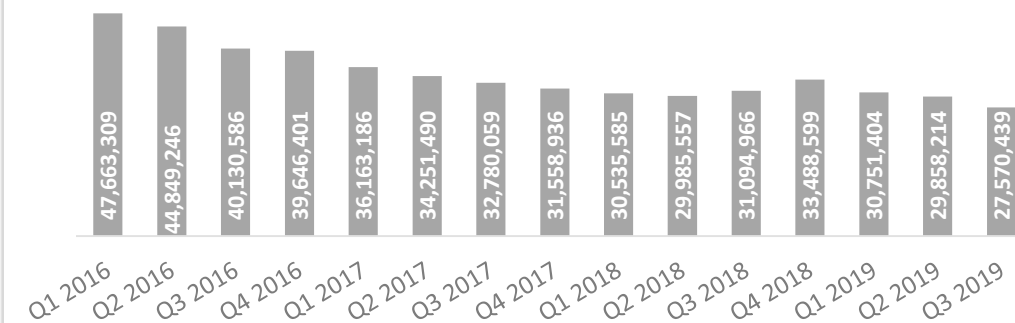
\*\* Revised for 2019 data



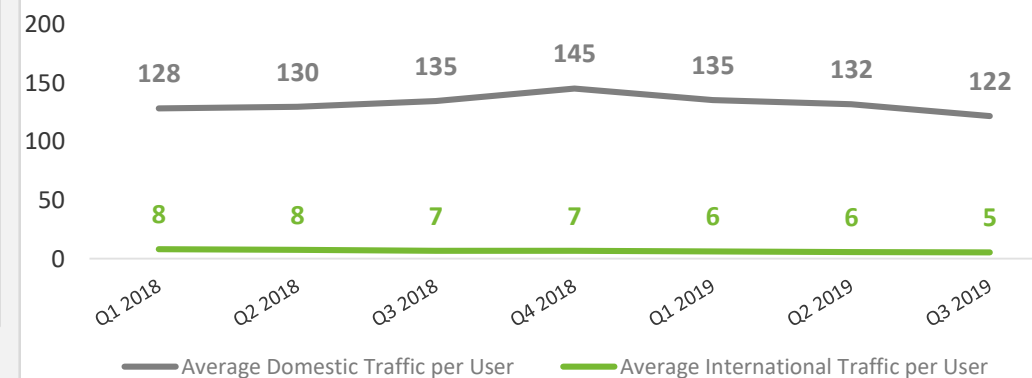
Total fixed domestic outgoing traffic in minutes\*\*

Q3 2018	Q3 2019	Change
31,094,966	27,570,439	11.33%

Fixed Line Total Domestic Outgoing Traffic (Minutes)

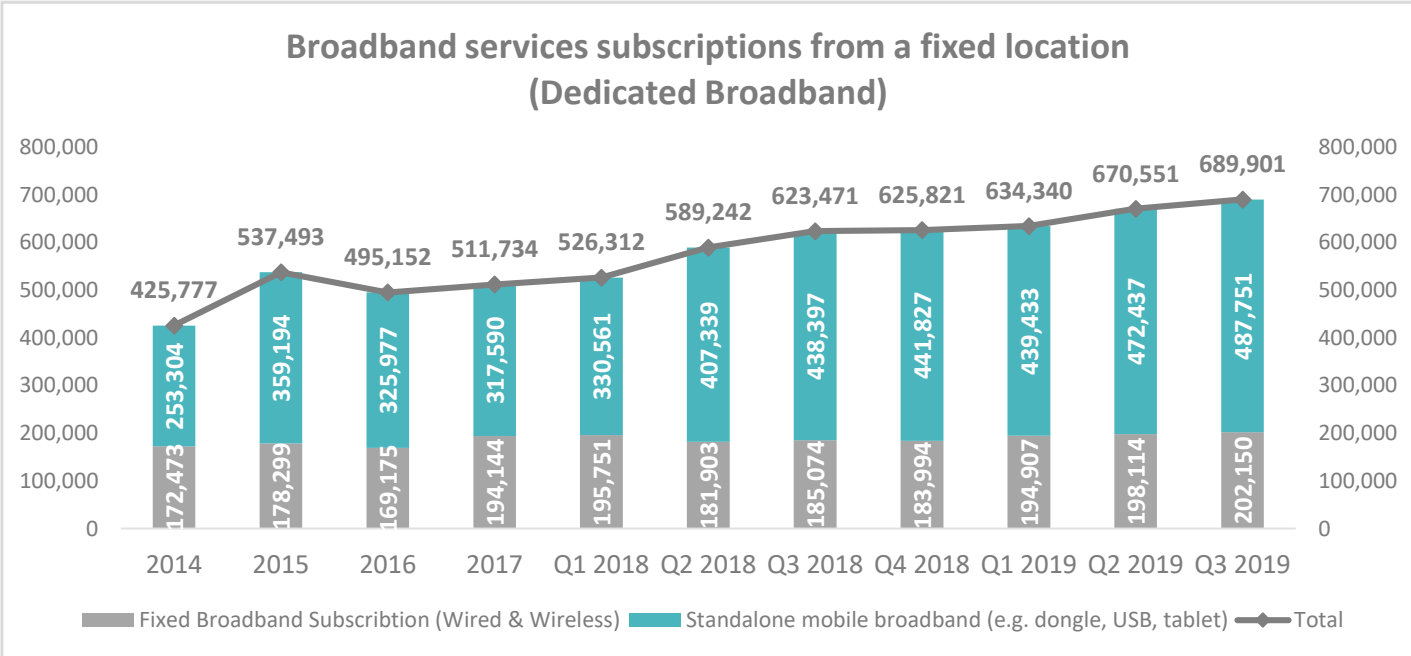


Average Outgoing Domestic & International Minutes Per Subscription

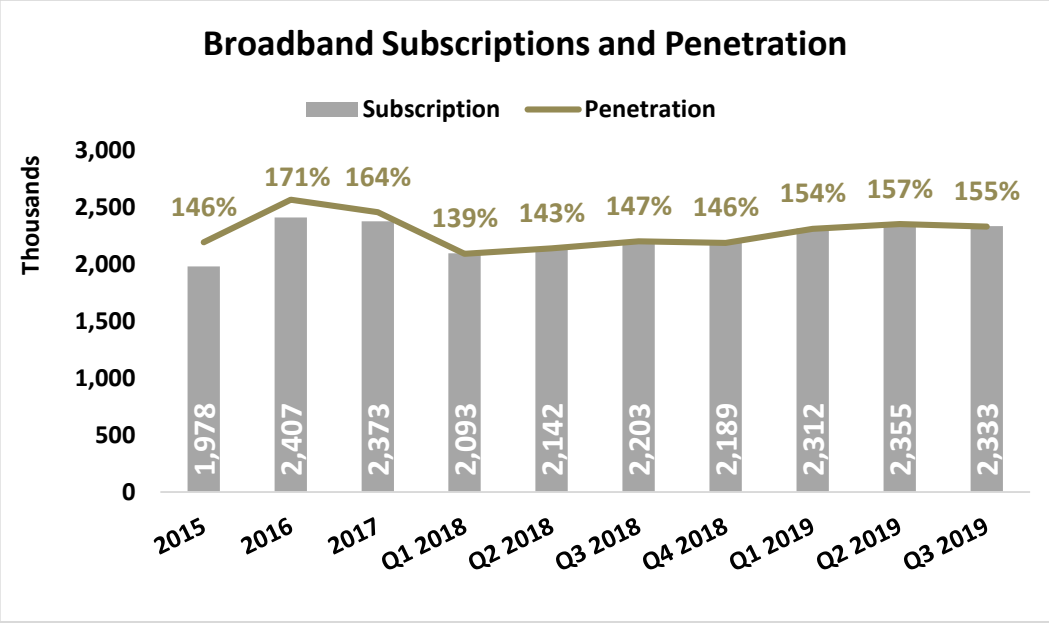


# Broadband services: Subscriptions

- Broadband penetration reached **155%** at the end of Q3 2019 and between Q3 2018 & Q3 2019 broadband subscription increased by **6%**.
- Fixed wired broadband subscription increased by **15%** while fixed wireless increased by **3%**.
- Overall Mobile broadband subscription increased by **6%**, at the same time, standalone broadband subscription increased by **11%**.



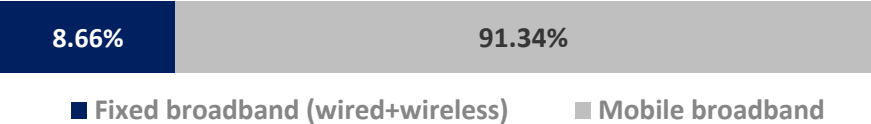
No. of broadband subscriptions (End of Q3 2019)\*  
**2,333,177**  
 155% Penetration rate



### Mobile Broadband – Q3 2019



### Proportion of broadband subscriptions by access type – Q3 2019



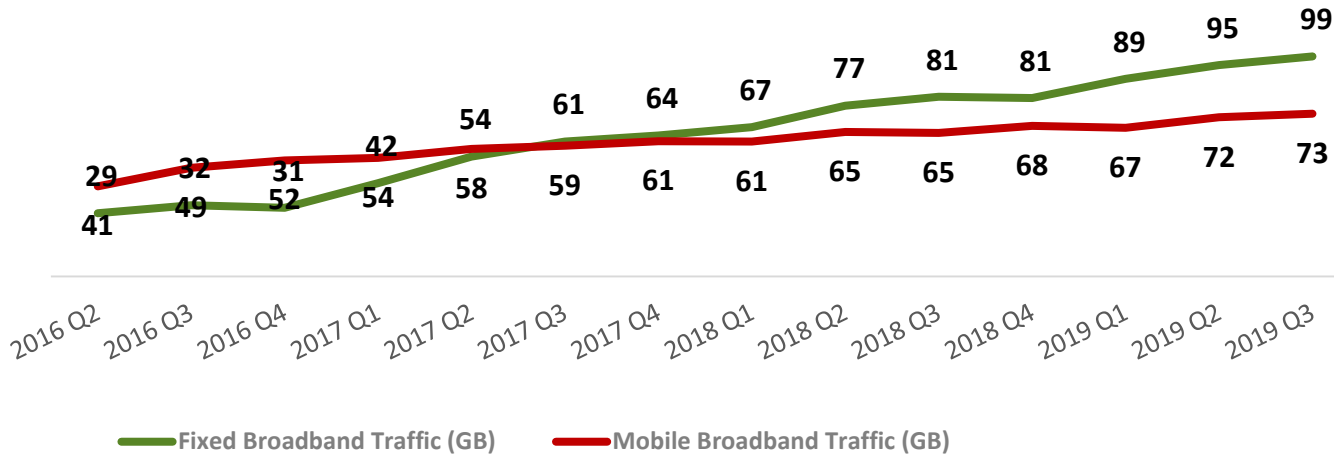
\* Revised for 2019 data

# Broadband services: Data Traffic



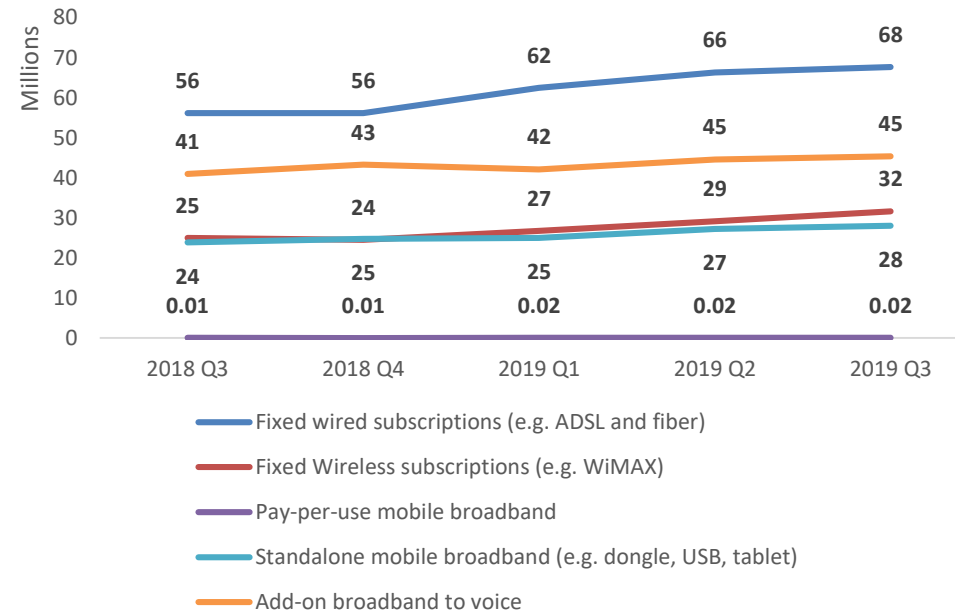
Total data traffic in Gigabyte\*

Quarterly data consumption (Petabyte)

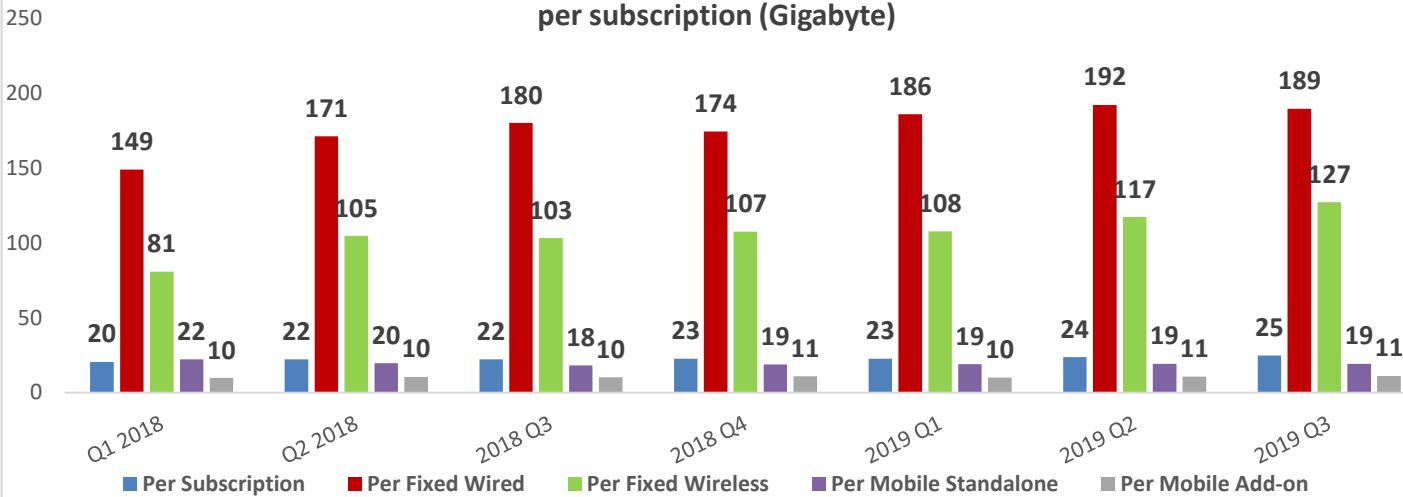


Q3 2018	Q3 2019	
145,882,799	172,677,060	▲ 18%

Traffic per technology (Gigabyte)



Monthly Average data consumption per subscription (Gigabyte)



- At the end of Q3 2019, Data consumption reached a new height of **172** petabyte, an increase of **18%** over the same period last year.
- Fixed Broadband traffic increased by **22.5%** over the same period while mobile data consumption increased by **13.2%**.

\* The OLO's traffic (data usage) is estimated for 2019

# Definitions

Indicator	Definition
<b>Fixed-telephone subscriptions</b>	Fixed-telephone subscriptions refers to the sum of active number of analogue fixed-telephone lines, voice-over-IP (VoIP) subscriptions, fixed wireless local loop (WLL) subscriptions.
<b>Prepaid mobile subscribers</b>	Prepaid mobile-cellular telephone subscriptions (ITU code i271p) Refers to the total number of mobile-cellular telephone subscriptions that use prepaid refills. These are subscriptions where, instead of paying an ongoing monthly fee, users purchase blocks of usage time. Only active subscriptions should be included (those used at least once in the last three months for making or receiving a call or carrying out a non-voice activity such as sending or reading an SMS or accessing the Internet).
<b>Postpaid mobile subscribers</b>	Postpaid mobile-cellular telephone subscriptions Refers to the total number of mobile-cellular subscriptions where subscribers are billed after their use of mobile services, at the end of each month. The postpaid service is provided on the basis of a prior arrangement with a mobile cellular operator. Typically, the subscriber's contract specifies a limit or allowance of minutes, text messages, etc. The subscriber will be billed at a flat rate for any usage equal to or less than that allowance. Any usage above that limit incurs extra charges. Theoretically, a subscriber in this situation has no limit on use of mobile services and, as a consequence, unlimited credit.
<b>Active mobile-broadband subscriptions</b>	<p>Active mobile-broadband subscriptions refers to the sum of standard mobile-broadband and dedicated mobile broadband subscriptions to the public Internet. It covers actual subscribers, not potential subscribers, even though the latter may have broadband enabled-handsets. The indicator can be further broken down into:</p> <p>Standard mobile-broadband subscriptions (ITU code i271mb_active): Refers to active mobile-cellular subscriptions with an advertised data speed of 256 kbit/s or greater that allow access to the greater Internet via HTTP and have been used to make a data connection using Internet protocol (IP) in the previous three months. Standard SMS and MMS messaging do not count as active Internet data connections, even if they are delivered via IP. This includes mobile subscriptions that use mobile-broadband services on a pay-per-use basis. It excludes mobile subscriptions with a separate monthly data plan for mobile-broadband access (see Indicator 25b, Dedicated mobile broadband subscriptions).</p> <p>Dedicated mobile-broadband subscriptions (ITU code i271md): Refers to subscriptions to dedicated data services (over a mobile network) that allow access to the greater Internet and that are purchased separately from voice services, either as a standalone service (e.g. using a data card such as a USB modem/dongle) or as an add-on data package to voice services that requires an additional subscription. All dedicated mobile-broadband subscriptions with recurring subscription fees are included as 'active data subscriptions' regardless of actual use. Prepaid mobile-broadband plans require use in the last three months if there is no monthly subscription. This indicator could also include mobile WiMAX subscriptions.</p>



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