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Hong Kong Telecommunications Report Q1 2016

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Abstracts

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BMI View: A decline in total mobile subscribers is attributable to high market saturation, which cannot sustain further growth in light of Hong Kong's slowing economic growth. Operators are deriving growth by migrating subscribers on to greater revenue-generating networks such as LTE. In addition, the potential for postpaid subscribers to outnumber prepaid ones will remove some subscriber number volatility and reduce churn rates for operators in the longer term. This change in the mobile landscape will also buoy average revenues per user (ARPU).

Latest Updates & Industry Developments

Latest data from the OFCA showed there were 16.72mn mobile subscribers at the end of August 2015, down by 1.7% y-o-y. We forecast 16.85mn mobile subscribers by the end of our five-year forecast period in 2019, for a penetration rate of 224.4%. The highly saturated mobile market provides little room for subscriber growth, and will revenue growth will come from migrating subscribers on to postpaid plans and encouraging consumption of more value-added services.

In wireline, the focus is on FTTH as subscribers demand faster and more reliable fixed network connections. Based on full year data from the regulator for broadband subscribers, we forecast the number of broadband internet subscriptions to reach 2.57mn by 2019, a 34.3% penetration rate.

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