

# Hong Kong Telecommunications Report Q3 2016

<https://marketpublishers.com/r/H8314364746EN.html>

Date: June 2016

Pages: 71

Price: US\$ 1,295.00 (Single User License)

ID: H8314364746EN

## Abstracts

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**BMI View:** BMI has attributed the fall in mobile subscriber numbers in 2015 to the saturated state of the Hong Kong mobile market, together with Hong Kong's slowing economic growth and already high levels of LTE adoption. Operators are deriving growth and value from customers by bundling higher-value products and services like video and smart applications to their primary offering. 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 has positive implications for average revenues per user (ARPU). Meanwhile, we are bullish on the announcement that broadband provider Hong Kong Broadband Network (HKBN) will acquire New World Development's telecoms and online marketing service businesses. Going forward we expect the enterprise market to provide strong support for Hong Kong's broadband market, given that businesses require high-speed broadband connectivity to facilitate their operations and cross-border communications.

### Latest Updates & Industry Developments

The latest data from the OFCA showed there were 16.775mn mobile subscribers at the end of December 2015 and 16.724mn, down by 1.4% y-o-y. We forecast 16.98mn mobile subscribers by the end of our five-year forecast period in 2020, for a penetration rate of 224.7%, of which 94.4% will be 3G/4G. The highly saturated mobile market provides little room for organic growth, and revenue growth will come from migrating subscribers on to postpaid plans and encouraging consumption of more value-added services.

In the wireline sector, 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 2.65mn by 2020, equivalent to a penetration rate of 35%.

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