

Chile - Telecommunication Services: Competitive market with potential for growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

In 2016 two companies dominated the mobile market in Chile, together they accounted for 71% of the total market. Entel edged first position, having 36% share, closely followed by Movistar with 35%. Interestingly, both companies have seen a decline in their subscriptions since 2012. Entel went from 10.1 million in 2012 to 9.5 million in 2016, and Movistar had 10.1 million in 2012, which dropped to 9.3 million in 2016. This trend is projected to continue for both companies until 2021, which opens up opportunities for the new market entrants such as WOM, who had a subscription base of 1.4 million in 2016.

MarketLine's Premium industry reports provide a comprehensive market view including sections on: industry risk & reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, and innovation.

KEY HIGHLIGHTS

LTE subscriptions soar

The rise of long-term evolution (LTE) and its adaptation has been exponential. Over the review period, LTE subscriptions grew a considerable CAGR of 289.5%, from 82,000 in

2012 to 4.8 million in 2016, with an anticipated increase over the forecast period at a CAGR of 21.8%, to 13 million in 2021.

Mobile subscriptions shows strong growth

During the review period, post-paid subscriptions increased at a CAGR of 6.6%, from 7.2 million in 2012 to 9.3 million in 2016, and are expected to grow further at a CAGR of 1.1% during the forecast period, to reach 9.8 million in 2021. This is partly due to attractive bundled services offered by post-paid operators, as there has been more focus placed on the post-paid segment in order to maintain a competitive edge. Moreover, LTE subscription continue to grow, consisting of 18% of the total mobile subscriptions in 2016, with expectations to increase to 48.7% by 2021.

Chile a hotbed for investment in Latin America

Chile is one of Latin America's most promising investment destinations. In terms of investment, infrastructure stands out as particularly attractive, with a significant emphasis by Chile's Government on large-scale investments into this sector. This is evident, as the Chilean Government announced investment of US\$900 million on infrastructure projects. To cater to increasing demand for data connectivity, both the government and operators plan to invest in FTTx/and 4G/LTE infrastructure. The government allocated a budget for the execution of the Southern Optical Fiber Project to improve connectivity in the most remote locations in the country.

SCOPE

Risk/Reward Index - enables you to assess the risks and potential rewards of investing in the Chilean Telecommunications market in comparison with other South-American countries.

Industry Snapshot and Industry View - Key Telecommunications Industry Statistics including fixed/mobile revenue, subscriptions, churn, market share, and ARPS are analyzed to reveal the key issues and trends driving market performance in the Chilean Telecommunications market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Chilean Telecommunications market.

Industry Benchmarking - Benchmark how the Chilean telecommunications market is performing compared to regional and global markets in terms of fixed or mobile revenue, subscriptions, ARPS, penetration, and usage to gauge potential for growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading players in the Chilean Telecommunications market by business segment on metrics such as churn, ARPU, and subscriber and revenue growth.

REASONS TO BUY

What was the CAGR of broadband penetration from the period 2012-2016, and what is it projected to be up to 2021?

How risky is it to invest in the Chilean Telecommunications industry compared to other South-American countries?

What will Chile's mobile market look like in 2021?

What are the Chilean Telecommunications industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

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