

# Colombia - Telecommunication Services: Highly promising, yet price conscious (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

This report provides an in depth analysis of the Colombian telecommunication market, exploring both the company landscape and patterns found in the different segments. It will also provide a forecast analysis on expected trends of the market, using reliable and current data available to predict future patterns in terms of subscriber and revenue growth. The Colombian market is considered highly promising for future investors, yet remains price conscious, all of which will be further detailed within the report.

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

Limited internet accounts indicates high potential

In 2016, 74% of the total population were internet users, of which only 12% had dedicated internet accounts. Fixed-broadband penetration stood at 19.4% during this year, offering a scope for development. This demonstrates high potential for growth. Telefonica selected Comarch, a Poland-based vendor to support the transformation of

its transport network in five Latin American countries, including Colombia.

### Customer retention remains a challenge

Telecom operators are finding it difficult to retain their customers due a lack of differentiation in service offerings. Colombia has a churn rate of 58.8% as compared to the Latin American and global averages of 52.7% and 45.2%, respectively. Similarly, peer countries recorded comparatively lower rates: Argentina (34.6%), Chile (53.7%), and Brazil (57.3%). Although, aggregate MOU by operator increased from 200 minutes per month in 2012 to 211 minutes per month in 2016, mobile ARPS decreased from US\$10.7 to US\$5.9 per month during the same period. Colombia's churn rate is decreasing annually; however, compared to the regional and global average it is high.

### Mobile data to lead the market

It is expected that mobile voice revenues will dominate data revenues until 2018. From 2019, mobile data will lead the market. Growth will be driven by the increasing use of the internet on handheld devices and the deeper penetration of smartphones. In contrast, mobile voice revenues declined from US\$4,777.8 million in 2012 to US\$2,391.8 million in 2016, at a review-period CAGR of 15.9% and will post a forecast-period CAGR of 4.7% to reach US\$1,880.5 million in 2021 due to alternative modes of communication and cheaper call rates.

## SCOPE

**Risk/Reward Index** - enables you to assess the risks and potential rewards of investing in the Colombian 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 that drive market performance in the Colombian telecommunications market.

**Industry SWOT Analysis** - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investments in the Colombian telecommunications market.

**Industry Benchmarking** - Benchmark how the Colombian telecommunications

market is performing compared to the 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 Colombian telecommunications market through the business segment on metrics such as churn, ARPU, and subscriber and revenue growth.

## REASONS TO BUY

An analysis into market performance, further divided by the key industry sectors, including: revenues, subscribers, ARPU, and customer churn?

How the development of new technologies and innovations within the industry will affect the future growth of the market?

Competitive landscape - who leads the Colombian market, and what challenges do they face?

How the increasing demand for fixed internet is likely to offset declining fixed voice revenues?

What are the key strengths and weaknesses of the market; what opportunities or challenges influence the market?

A comprehensive look into the key developments of the Colombian telecom market, and how these have affected market growth?

How has the financial deals landscape changed over 2015 to 2016, and what were the principle deals?

An analysis into the key drivers of the market, and how these affect the industry's main segments: data, prepaid, postpaid, broadband, and IPTV?

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