

France - Telecommunication Services: Developed market with innovation driving growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

With a mobile subscription base of 80 million and a penetration level of 124% in 2016, France is a mature market. Due to an increase in post-paid and business subscriptions, mobile subscriptions increased at 4.10% CAGR from 68 million in 2012 to 80 million in 2016 and are expected to reach 93.4 million by 2021 at a 3.2% CAGR. Declining churn rates are indicative of high customer retention, and growth in usage indicates a positive outlook. Growing adoption of smartphones has led to enhanced mobile use.

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

Surge in postpaid subscriptions, coupled with customer retention initiatives, reducing churn rate

Telecom operators in France have low churn rates which shows operators have managed retain their customers by offering quality services in bundled offerings at a low price. Aggregate churn rates have declined on a consistent basis from 38.9% in 2012 to

28% in 2016 and is expected to further decrease to 18.3% by 2021. Postpaid subscriptions increased at 7.3% CAGR from 53.4 million in 2012 to reach 70.8 million in 2016 and is expected to increase at 4.7% CAGR to reach 89.1 million subscribers by 2021, mainly attributed to a surge in M2M connections and the availability of device bundles.

Decline in traditional messaging services affecting telecom revenue

With the rise in demand for data related services, traditional messaging services have stalled, which impacts mobile revenue. Traditional messaging service revenue declined at -16.6% CAGR from US\$3,676.3 million in 2012 to US\$1,779.3 million in 2016 and is expected to decrease further at

-7.7% CAGR over 2016-2021 to US\$1,194.7 million by 2021. The decline is attributed to a shift in preference of customers towards Over-The-Top (OTT) applications such as WhatsApp and Skype.

Rising surveillance and blocking measures

Since the Charlie Hebdo attacks in Jan 2015, the government has become more wary about online content and, in the wake of this, it has passed a new decree called the Intelligence Law which allows agencies to conduct electronic surveys without a court order. This may have an adverse impact on Internet and data usage, which in turn may affect the top-line of operators.

SCOPE

Risk/Reward Index - enables you to assess the risks and potential rewards of investing in the France Telecommunications market in comparison with other European 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 France Telecommunications market.

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

Industry Benchmarking - Benchmark how the France 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 France Telecommunications market by business segment on metrics such as such as churn, ARPU, and subscriber and revenue growth.

REASONS TO BUY

Have technological advances drastically changed the face of the Telecommunications industry?

How is the market performing in terms of: Revenues, Subscribers, ARPU, and Customer Churn?

How risky is it to invest in the France Telecommunications industry compared to other European countries?

What is driving the performance of key industry segments such as Voice, Data, Prepaid, Postpaid, Broadband, and IPTV?

Who are the leading players in the France Telecommunications industry and how does their performance compare?

What trends are being witnessed within the France Telecommunications industry?

How will the breakdown for mobile connection technologies look by 2021?

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

How has the financial deals landscape changed in 2015 and 2016?

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