

# Germany - Telecommunication Services: Mature yet promising market with challenges (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

This report provides an in depth analysis into the current and forecast trends of the German telecommunications market, offering reliable data on the deals and competitive company landscapes over the past few years, how demand for improved technological innovations is effecting the voice and internet segments, and an overview of initiatives by the German Government. The German market is considered to be mature yet promising, with low churn rates. This, and much more, is 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

Mobile data to help add to growth in mobile subscriptions

Currently 77.0% of the German population subscribe to mobile services. Subscriptions increased at a CAGR of 1.2% during the review period, from 109.9 million in 2012 to 115.3 million in 2016 and are expected to reach 130.1 million by 2021, growing at a

CAGR of 2.4% over 2016-2021.

Growth in mobile subscriptions is expected due to higher demand for mobile data, especially for video and music streaming, which is supported by the availability of affordable smartphones.

T-Mobile Germany held top position in mobile service revenue

T-Mobile Germany had the highest revenue at US\$9,111.0 million in 2016 in the mobile segment despite revenue decreasing from US\$10,191.0 million in 2012 to the current level in 2016. Reduction in connections with MagentaEINS acted as an impediment in addition to increased competitive pressure in the business consumer segment. However, it added 230,000 new contract customers.

Decline in overall fixed line revenues

Fixed line service revenues which stood at US\$20,777.0 million in 2016 (down at a CAGR of 7.7% during 2012-2016), are expected to remain flat and value US\$20,844.0 million in 2021. Internet revenue which is expected to grow at a CAGR of 3.2% over the forecast period to US\$12,371.0 million, backed by an increase in internet accounts and penetration, should lend some support to falling fixed line business revenue. The expected increase in Internet revenue will be offset by rapid fall in fixed voice revenues.

Fixed voice revenue is expected to decrease at a CAGR of -4.9% to US\$7,477.0 million over 2016-2021.

## SCOPE

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

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investments in the German

telecommunications market.

Industry Benchmarking - Benchmark how the German 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 German telecommunications market through the business segment on metrics such as churn, ARPU, and subscriber and revenue growth.

## **REASONS TO BUY**

In regards to the key industry sectors (revenues, subscribers, ARPU, and customer churn), what patterns are forecast in market performance, particularly when compared to review period trends?

How is the German Government responding to increasing demands and changes in the market landscape - an overview of recent governmental initiatives?

What are the primary developments made over the review period, and which companies or organizations were involved?

What opportunities and challenges are to be found in the German telecom market, along with an overview of the strengths and weaknesses?

How price reductions and new products are increasing competition within the German market?

A detailed analysis of the primary drivers of the market, in regards to the market sectors: data, prepaid, postpaid, broadband, and IPTV?

How the deals landscape has changed over the years 2015 to 2016?

What are the main benchmarking trends between Germany and the regional and Global averages?

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