

Mexico - Telecommunication Services: An attractive but price sensitive destination (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Within the Mexican telecommunication market, micro-economic conditions have supported policies that favor growth and encourage investments. As such, the market is considered an attractive destination for potential investors. This report provides readers with an in depth analysis into the Mexican market's current and forecast trends and key developments, exploring the competitive landscape, technological innovations, and growth patterns of different segments, among much more.

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

Telcel and Movistar captured 90% of the mobile market

Telcel's mobile subscriptions recorded a review-period CAGR of 1.0%, growing from 70.4 million in 2012 to 73.2 million in 2016. Subscriptions will post a forecast-period CAGR of 2.6%, to reach 83.4 million in 2021. In an attempt to consolidate its market dominance, Telcel launched new services, including Telcel Pay in 2016. In the same

year, Movistar Mexico reported a relatively low churn rate of 50.5%. The market entry of AT&T via the acquisition of Lusacell in 2014 and Nextel in 2015, has allowed the firm to gain an initial 10% share of the mobile market. AT&T's entry further intensified price competition.

Weak competitive position in mobile adoption

Compared to the global and regional average, mobile adoption in Mexico is relatively low, which results in relatively lower subscription base. Subscriptions registered a review-period CAGR of 2.7%, while North American mobile subscriptions posted a CAGR of 5.9% and global subscriptions rose at a CAGR of 4.2%. Mobile penetration grew from 63% in 2012 to 66% in 2016, while the regional average increased from 75% to 80%. Multi-sim ownership is less common in Mexico.

Fixed residential internet revenue to exceed voice revenue

At US\$2,893.3 million in 2016, fixed residential internet revenue accounted for 77.9% of the total fixed-line residential service revenue, and 71.2% of total fixed-line internet (residential and business combined) revenue in 2016. Fixed residential internet revenues rose from US\$2,404.0 million in 2012 to US\$2,893.3 million in 2016 at a CAGR of 4.7%, and will post a forecast-period CAGR of 5.2% to value US\$3,730.8 million in 2021.

SCOPE

Risk/Reward Index - enables you to assess the risks and potential rewards of investing in the Mexican telecommunications market in comparison with other North America 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 Mexican telecommunications market.

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

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

REASONS TO BUY

How the market performed over the review period, compared to its expected performance over the forecast period, in terms of: revenues, subscribers, ARPU, and customer churn?

How are growing investments on infrastructure by the Mexican Government affecting the market?

An overview of the key developments in the Mexican telecom market?

What are the main strengths and weaknesses in the Mexican telecom market, and what opportunities or challenges does it face?

How is increasing demand for fixed-internet services affecting the fixed-voice segment?

An analysis of the key drivers of the market, and the impact they have on the market's sectors: data, prepaid, postpaid, broadband, and IPTV?

What are the changes in the financial deals landscape, along with the notable deals made?

How has the competitive company landscape changed, and who are the key players?

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