

QUARTERLY COMMUNICATIONS STATISTICS

October-December 2019 Operators' Submissions

NOTE: The SOURCE of all data contained in this report are from Operators' returns

A: TELECOM SERVICES

1. TARIFFS

1.1. Voice and SMS Basic Tariffs (Tax exclusive) as of December 2019

These are per minute charges for making direct calls without subscribing to a bundle. They are also known as Pay As You Go or Standard tariff

Fig 1.1a On Net Voice Tariff

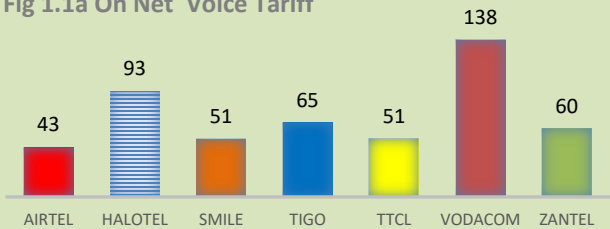


Fig 1.1b Off Net Voice Tariff

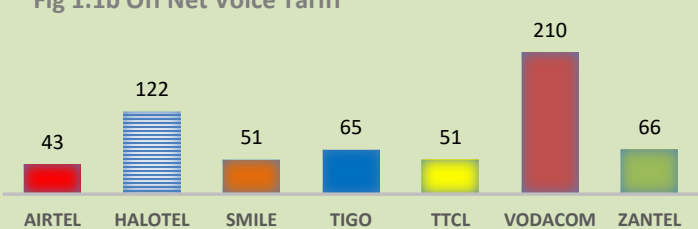


Fig 1.2c East Africa Voice Tariffs

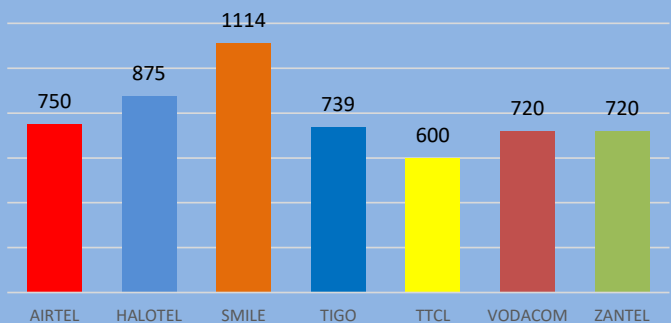


Fig 1.2d International Voice Tariffs

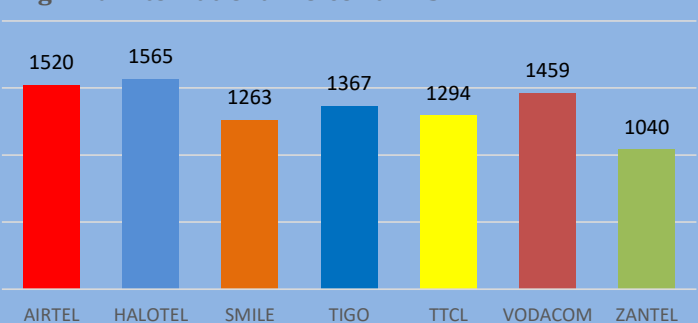


Fig 1.3e Local SMS Tariffs

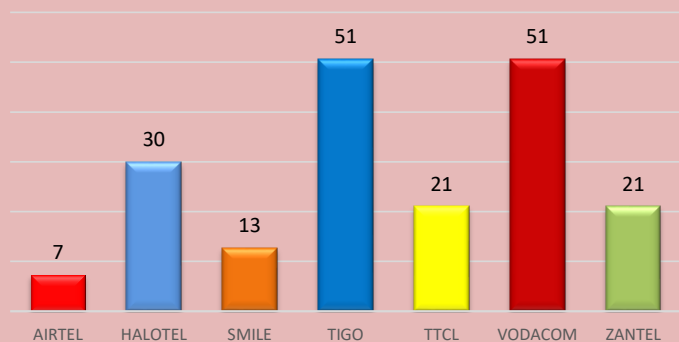


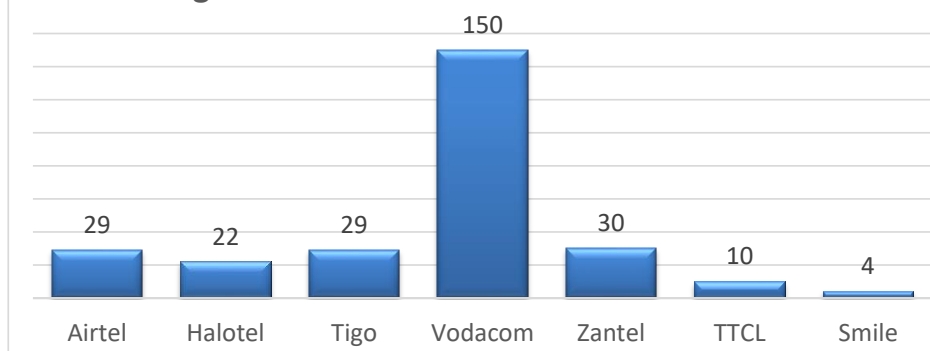
Fig 1.3f International SMS Tariffs



1.2 Standard Data Tariff as of December 2019 (Tax Exclusive)

Operator	Price/MB
Airtel	29
Halotel	22
Tigo	29
Vodacom	150
Zantel	30
TTCL	10
Smile	4

Fig. 1.2 Standard Data Tariff - Tax Exclusive



1.3 Bundle Tariff

1.3.1 Estimated and Aggregated Bundle Tariffs (Tax exclusive) as of December 2019

These are per one unit (1 minute, 1 SMS and 1 MB) price aggregated from daily, weekly and monthly bundle consisting of Minutes, SMS and MBs with the assumption that ratio of each of these three components in the bundle is contrued from a standard tariff of 1 minute, 1 SMS and 1 MB

Fig. 1.2a: On Net Bundle Tariff

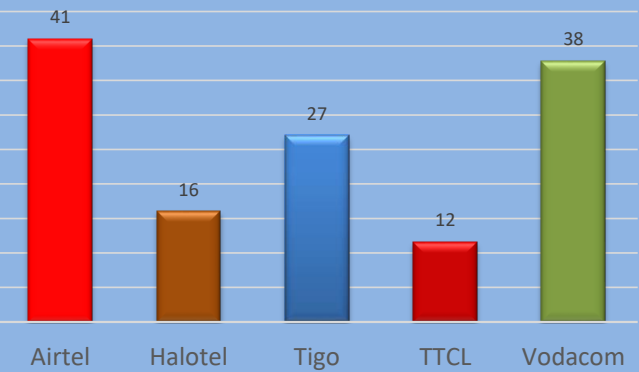
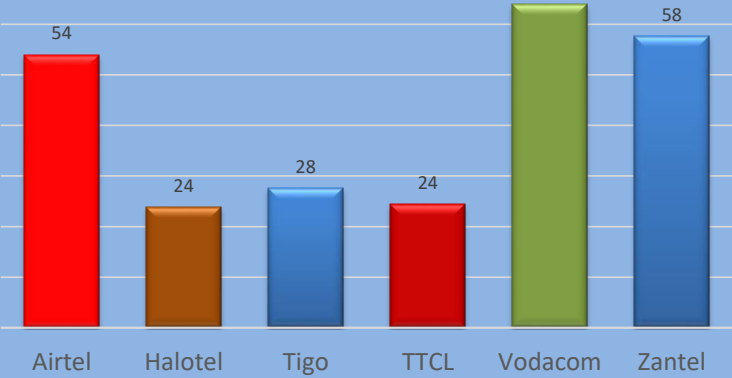
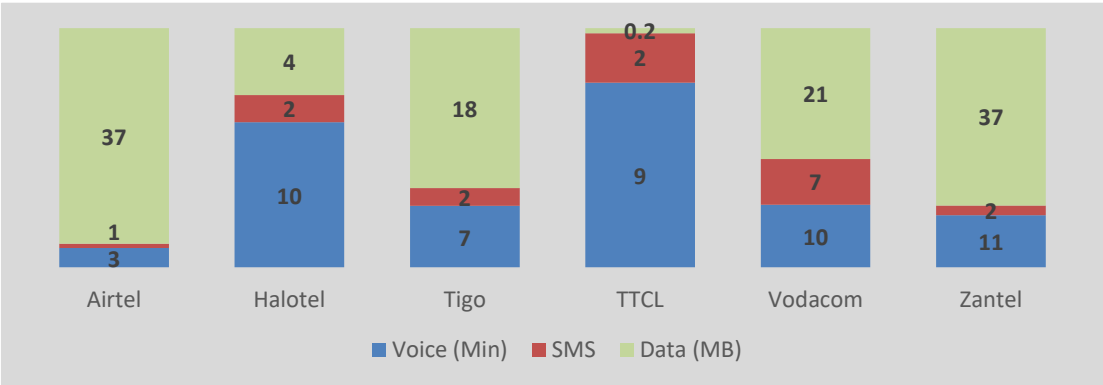


Fig. 1.2b: Off Net Bundle Tariff

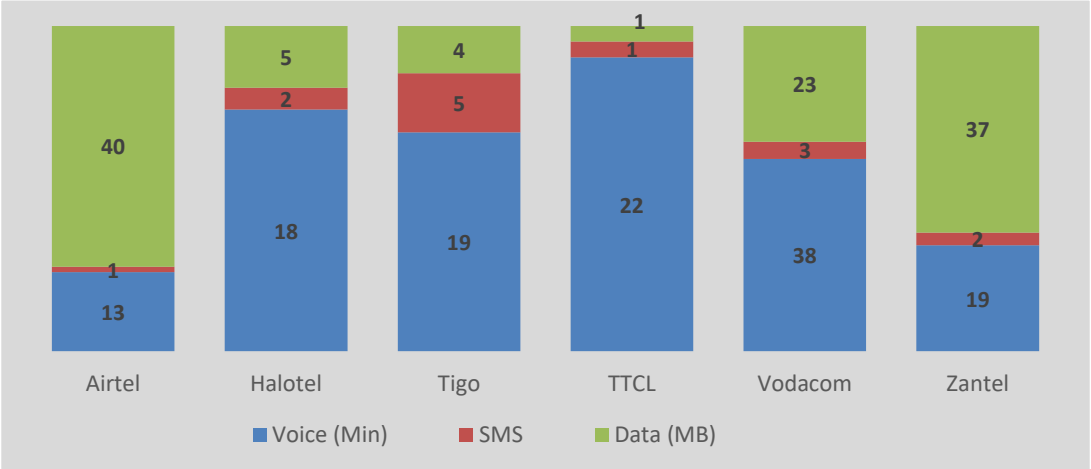


1.3.2 Estimated price of each component (1 minute, 1SMS and 1 MB) in the Bundle Tariff

1.3.2a On Net Estimates



1.3.2b Off Net Estimates



1.4 Industrial aggregate of Weighted Average Tariffs (WAT)

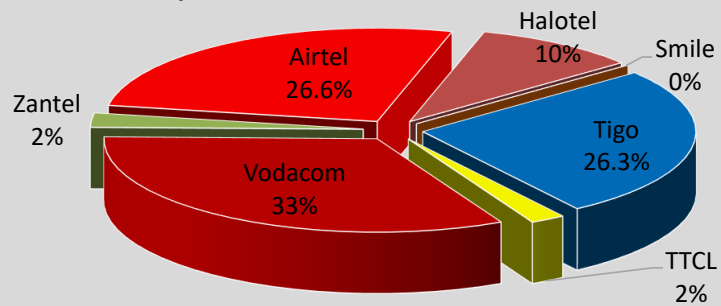
Destination	Basic Tariffs/1Minute	Bundle Tariffs/1minute, 1SMS and 1MB
On Net	87	24
Off Net	90	33
EA	732	
Other Int.	1,439	
Local SMS	35	
International SMS	182	

2. VOICE TELECOM SUBSCRIPTIONS

2.1. Number of Voice Telecom Subscriptions and Market Shares

Operator	OCTOBER	NOVEMBER	DECEMBER
Airtel	12,143,922	12,428,969	12,722,224
Halotel	4,239,693	4,142,712	4,641,701
Smile	1,624	1,184	1,222
Tigo	12,230,772	12,428,601	12,572,826
TTCL	890,428	937,948	981,072
Vodacom	14,979,714	15,357,823	15,672,390
Zantel	1,173,130	1,153,669	1,170,085
TOTAL	45,659,283	46,450,906	47,761,520

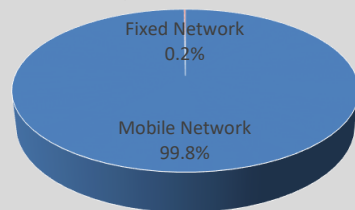
Fig. 2.1 Operators' Subscription Market Shares



2.2 Subscriptions to Mobile and Fixed Network

NETWORK	OCTOBER	NOVEMBER	DECEMBER
Mobile Network	45,582,235	46,374,209	47,685,232
TTCL	77,048	76,697	76,288
ZANTEL	0	0	0
Fixed Network	77,048	76,697	76,288
TOTAL	45,659,283	46,450,906	47,761,520

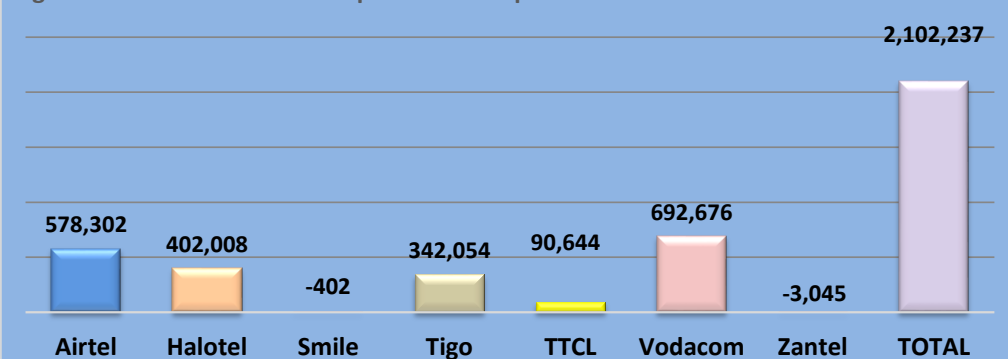
Fig.2.2: Mobile and Fixed Operators Subscription Market Shares



2.3 Addition of Subscriptions per Operator in this quarter (Oct-Dec 2019)

Operator	NOVEMBER	DECEMBER	Quarter Net Addition
Airtel	285,047	293,255	578,302
Halotel	-96,981	498,989	402,008
Smile	-440	38	-402
Tigo	197,829	144,225	342,054
TTCL	47,520	43,124	90,644
Vodacom	378,109	314,567	692,676
Zantel	-19,461	16,416	-3,045
TOTAL	791,623	1,310,614	2,102,237

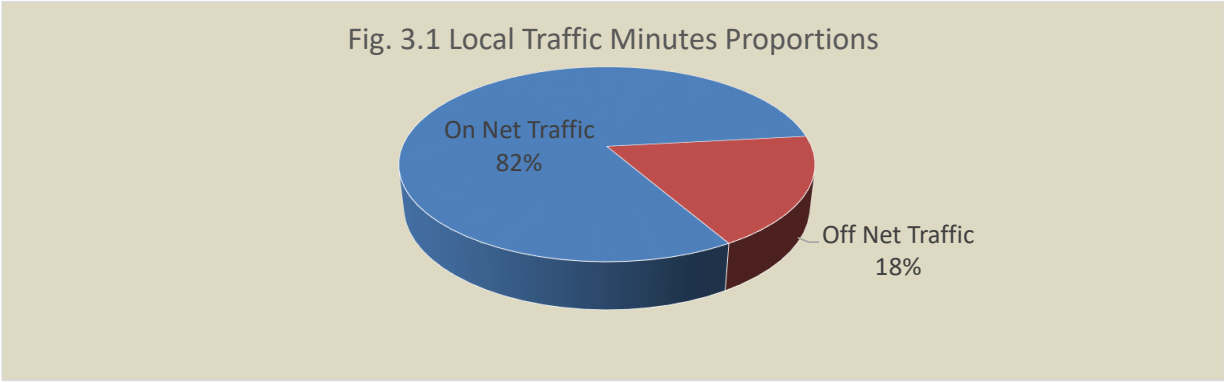
Fig. 2.3 Net Addition of Subscriptions in this quarter



3. TRAFFIC MINUTES

3.1 Local Traffic

Destination	OCTOBER	NOVEMBER	DECEMBER	TOTAL
On Net Traffic	5,024,686,381	4,802,379,880	4,771,179,596	14,598,245,857
Off Net Traffic	1,075,295,208	1,056,401,443	1,160,684,884	3,292,381,535
TOTAL	6,099,981,589	5,858,781,323	5,931,864,480	17,890,627,392



3.2 International Traffic

Destination	OCTOBER	NOVEMBER	DECEMBER	TOTAL
Traffic to EA	1,030,017	985,275	1,009,813	3,025,105
Traffic From EA	1,602,479	1,526,296	1,552,202	4,680,977
Traffic to other Int	3,571,901	3,145,177	2,389,387	9,106,465
Traffic From Othe Int	3,767,344	3,432,011	3,552,089	10,751,444
TOTAL	9,971,741	9,088,759	8,503,491	27,563,991

Fig 3.2a Traffic Minutes to/From EA Countries

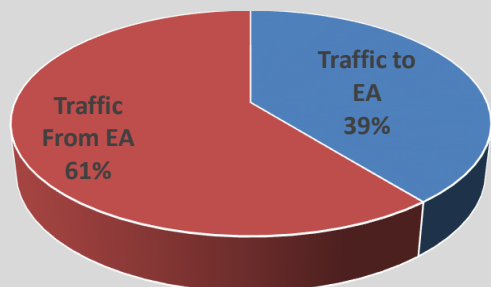
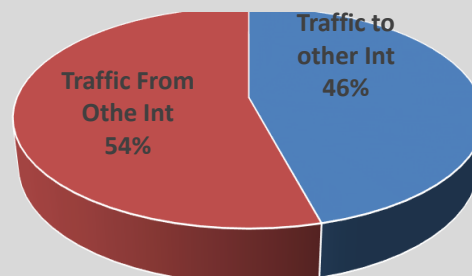


Fig 3.2b Traffic Minutes to/From other Internationals



3.3 Percentage Shares of Traffic Minutes Per Operators as of December 2019

3.3(a) Local Traffic Minutes

Fig 3.3a On net Traffic Shares

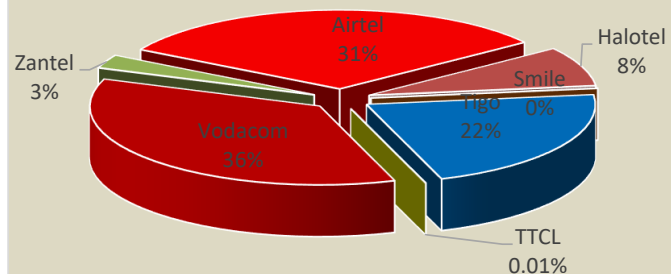
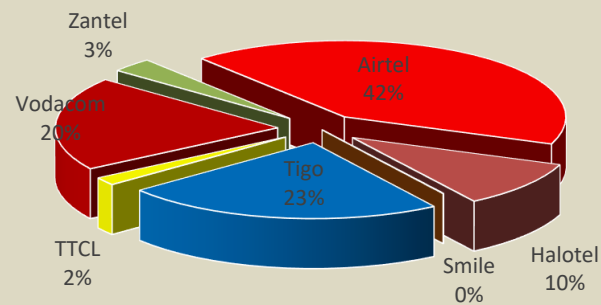
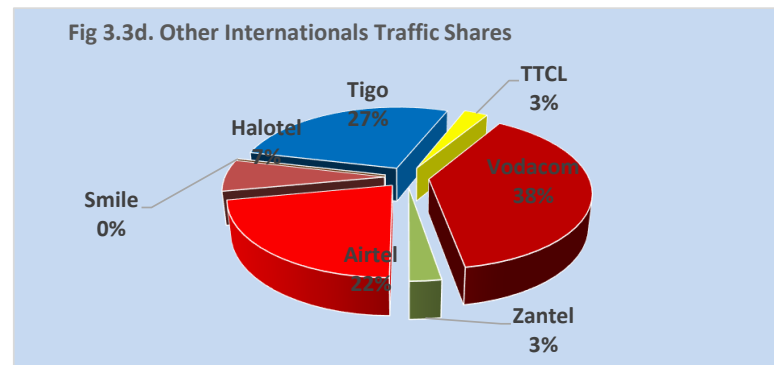
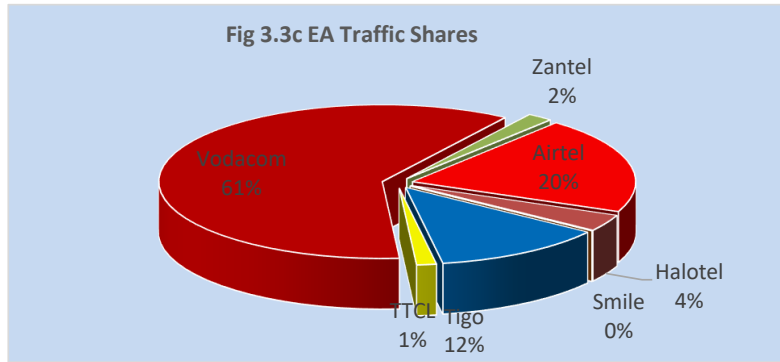


Fig 3.3b. Off Net Traffic Shares



3.3(b) International Traffic Minutes



3.4 Minutes Used Per Subscriber (MoU)

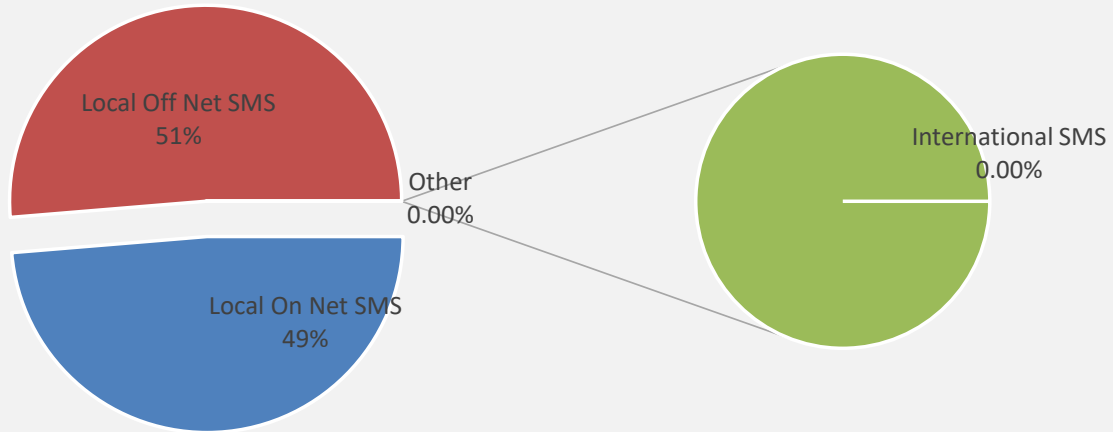
Destination	OCTOBER	NOVEMBER	DECEMBER	TOTAL
On net	110	103	100	313
Off Net	24	23	24	71
EA	0.02	0.02	0.02	0.07
Other Internationals	0.04	0.03	0.03	0.10
TOTAL	134	126	124	384

4. SHORT MESSAGES (SMS)

4.1 Local and International SMS

Destination	OCTOBER	NOVEMBER	DECEMBER	TOTAL
Local On Net SMS	4,136,541,600	5,204,718,528	5,820,922,997	15,162,183,125
Local Off Net SMS	4,067,888,360	5,536,012,437	6,374,534,087	15,978,434,884
International SMS	512,750	457,430.0	510,562.0	1,480,742
TOTAL	8,204,942,710	10,741,188,395	12,195,967,646	31,142,098,751

Fig. 4.1 Percentage Shares of Local and International SMS



4.2 Percentage Shares of SMS Per Operators

Fig 4.2a Percentage Shares of Local SMS

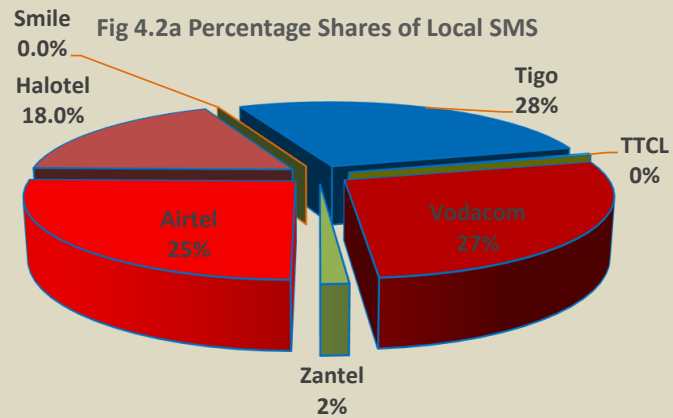
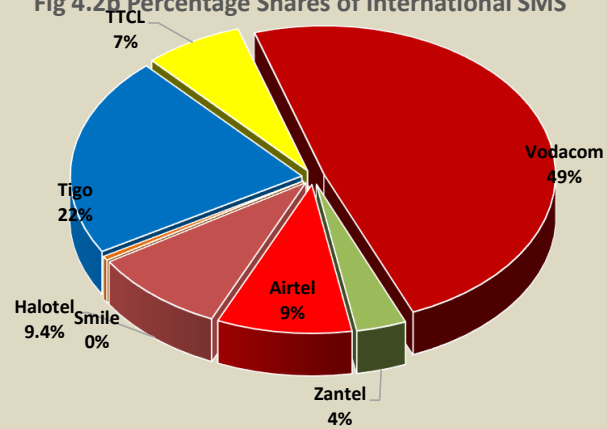


Fig 4.2b Percentage Shares of International SMS

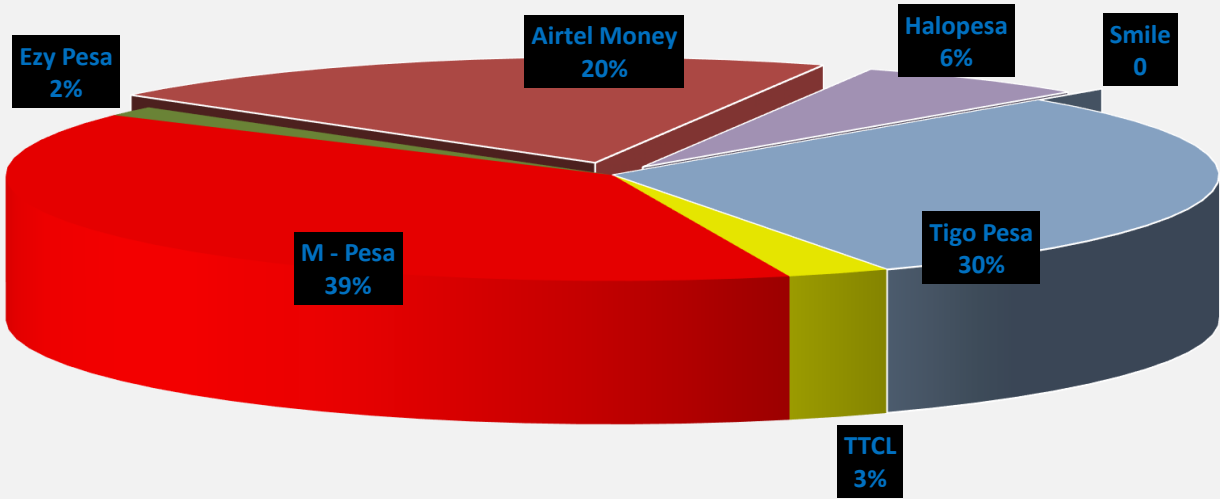


5. MOBILE MONEY SERVICES

5.1 Mobile Money Subscriptions (Mobile Money Accounts)

Operator	OCTOBER	NOVEMBER	DECEMBER
Airtel Money	4,728,128	4,939,677	5,180,560
Halopesa	1,528,295	1,265,866	1,614,540
Smile	0	0	0
Tigo Pesa	6,934,780	7,006,294	7,802,996
TTCL	618,209	669,407	712,475
M - Pesa	9,822,889	9,991,443	10,168,290
Ezy Pesa	325,513	390,417	385,457
TOTAL	23,957,814	24,263,104	25,864,318

Fig. 5.1 Mobile Money Subscriptions Market Share as of Sept 2019



5.2 Mobile Money Transactions

Operator	OCTOBER	NOVEMBER	DECEMBER
Airtel Money	48,973,000	48,178,000	50,426,871
Halopesa	11,340,435	11,967,485	13,300,251
Smile	0	0	0
Tigo Pesa	79,454,335	78,383,023	82,644,489
TTCL	614,497	700,094	801,328
M - Pesa	121,451,496	119,990,557	135,204,441
Ezy Pesa	2,601,932	2,666,831	2,839,461
TOTAL	264,435,695	261,885,990	285,216,841

5.3 Mobile Money Value of Transactions

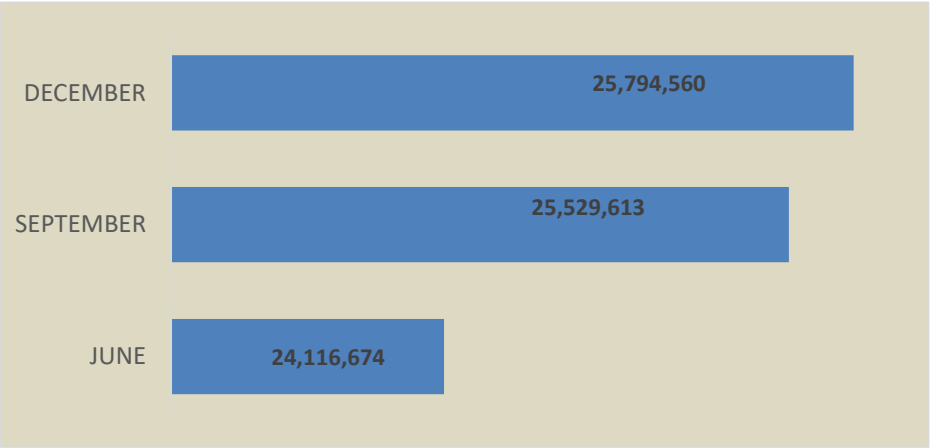
Operator	OCTOBER	NOVEMBER	DECEMBER
Airtel Money	1,508,294,235,823	1,581,293,999,726	1,639,319,006,525
Halopesa	142,844,418,569	153,200,791,556	168,692,308,122
Smile	0	0	0
Tigo Pesa	2,101,274,559,237	2,076,961,954,523	2,252,128,516,774
TTCL	7,704,173,547	9,303,507,807	10,608,017,238
M - Pesa	5,330,205,074,667	5,244,371,484,212	5,340,184,321,233
Ezy Pesa	73,728,868,855	79,848,855,149	89,630,592,109
TOTAL	9,164,051,330,698	9,144,980,592,972	9,500,562,762,001

5.3 Mobile Money Transaction and Value per Subscription

	OCTOBER	NOVEMBER	DECEMBER
Transaction/Subs	11	11	11
Value/Subs	382,508	376,909	367,323

6. ESTIMATES OF INTERNET USERS

JUNE	SEPTEMBER	DECEMBER
2019	2019	2019
24,116,674	25,529,613	25,794,560



6. SUMMARY OF COMMUNICATIONS STATISTICS

6.1 TELECOM SERVICES

6.1a Subscriptions and Teledensity

Year	2014	2015	2016	2017	2018	2019
Fixed	142,950	142,819	129,597	127,094	124,238	76,288
Mobile	34,108,851	39,665,600	40,044,186	39,953,860	43,497,261	47,685,232
Total	34,251,801	39,808,419	40,173,783	40,080,954	43,621,499	47,761,520
Penetration	71%	79%	80%	78%	81%	85%

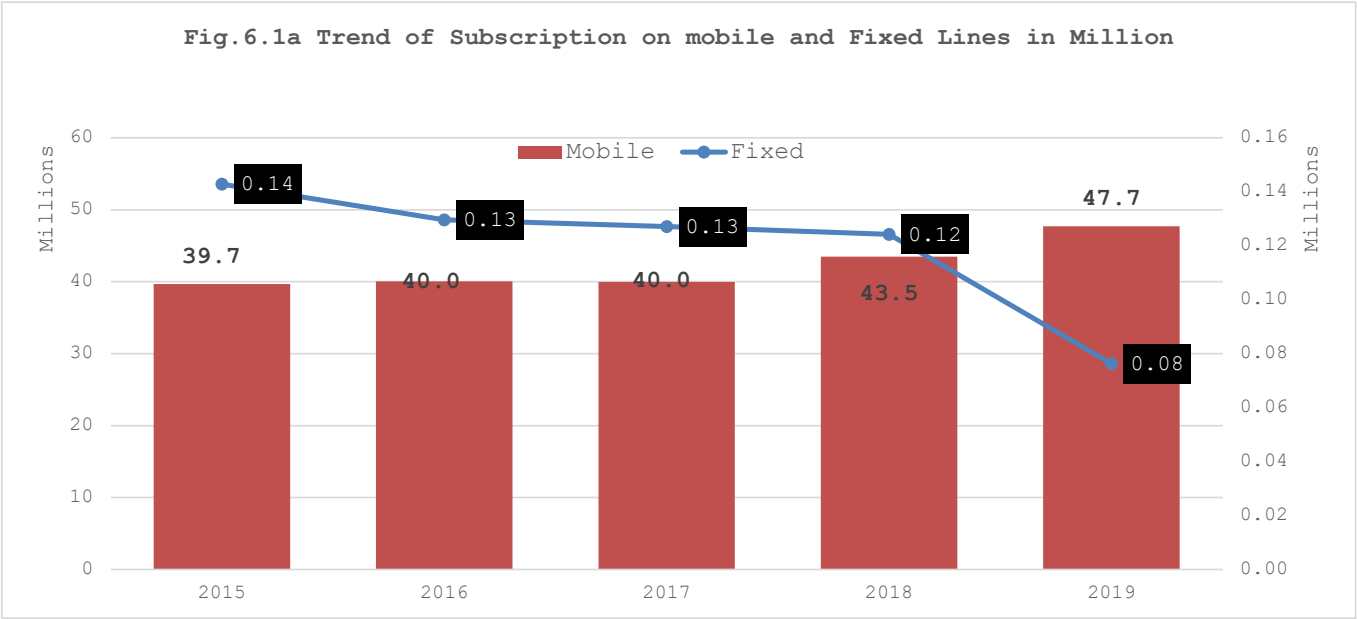
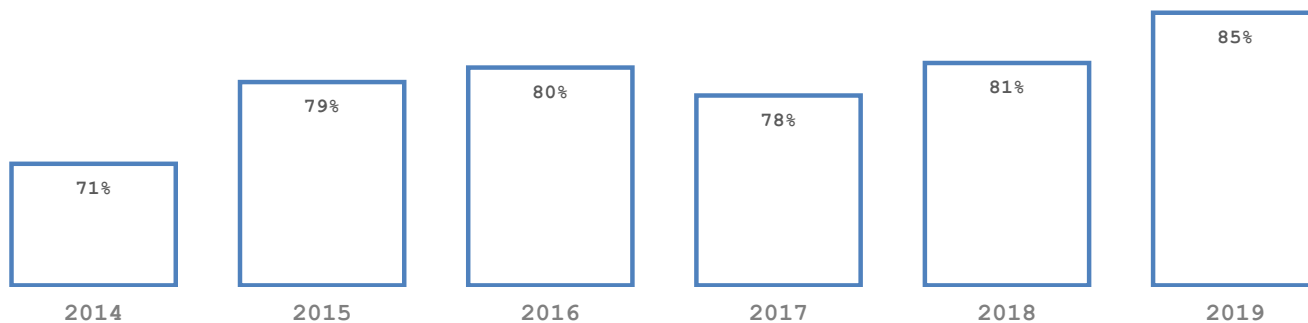


Fig.6.1b Voice Telecom Penetration



6.1b Traffic (in minutes) - National and International

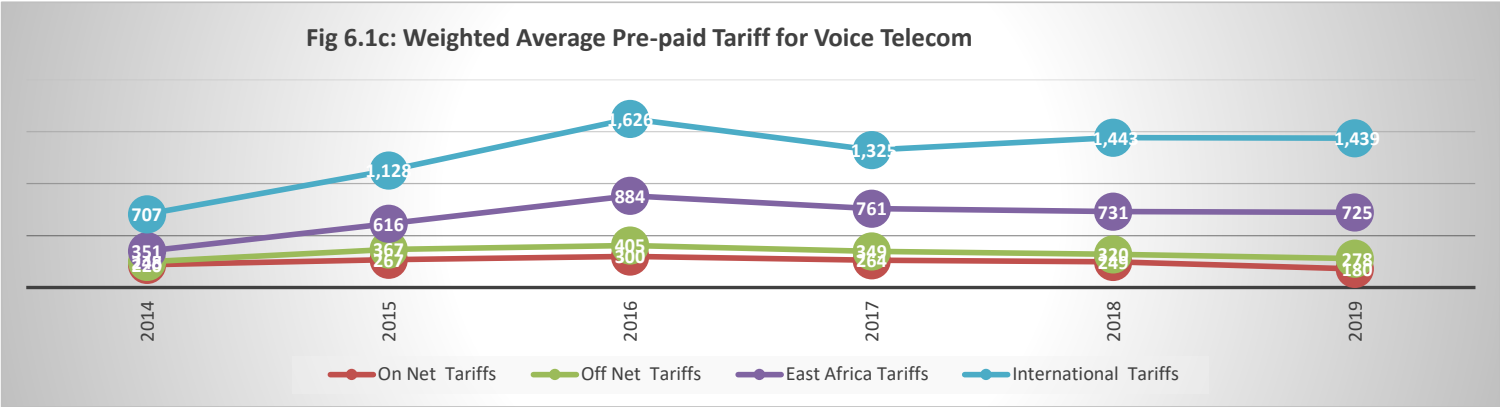
Years	2014	2015	2016	2017	2018	2019
National Traffic (On & Off Net)	41,689,212,148	43,461,094,130	51,023,633,898	56,053,981,867	62,226,915,881	67,383,030,453
Traffic to International	234,080,182	219,401,125	145,972,186	99,413,092	74,883,523	57,550,480
Traffic from International	258,420,938	221,145,509	171,320,372	104,148,723	81,094,882	67,089,598

6.1c Tarffic (in Minutes - To and From East Africa and International

Traffic to East Africa	53,329,431	44,821,161	35,811,296	21,952,159	15,777,208	14,252,483
Traffic from East Africa	54,174,595	54,078,219	79,875,098	43,845,601	26,161,712	21,989,062
Traffic to Other International	180,750,751	174,579,964	110,160,890	77,460,933	59,106,315	43,297,997
Traffic from Other International	204,246,343	167,067,290	91,445,274	60,303,122	54,933,170	45,100,536

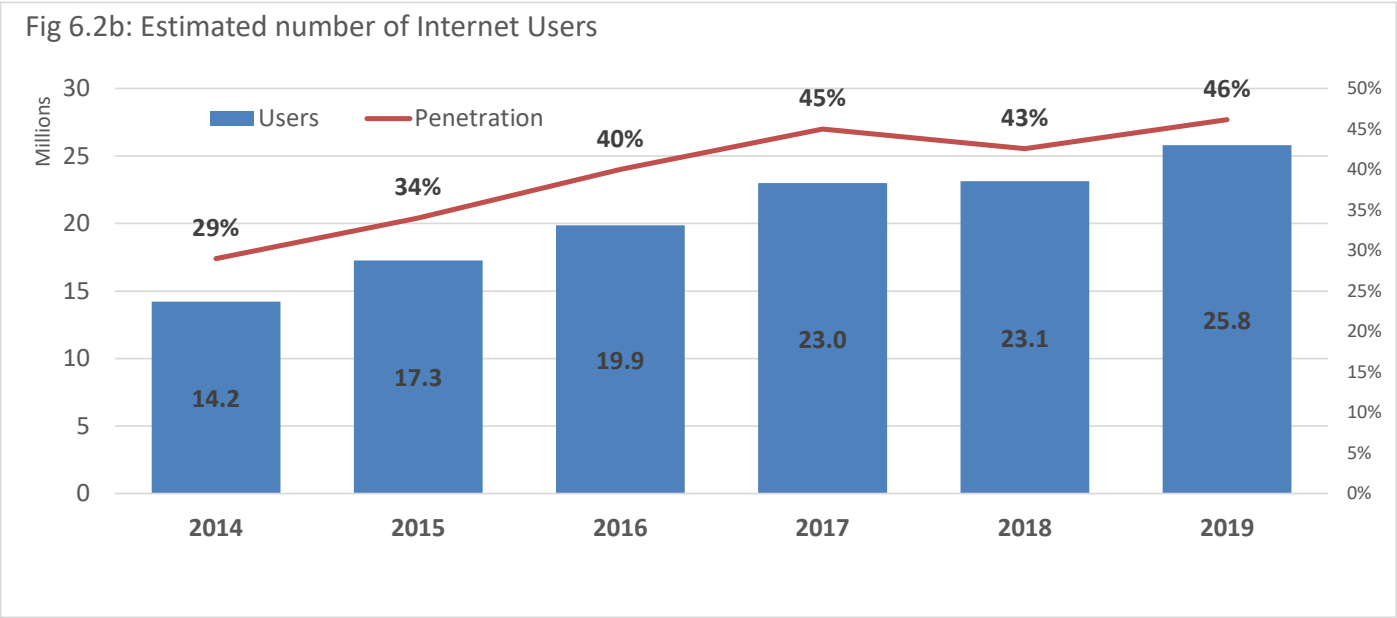
6.1c Industrial Aggregate of Weighted Average Prepaid Tariff for voice Telecom (Tax Exclusive)

Years	2014	2015	2016	2017	2018	2019
On Net Tariffs	220	267	300	264	249	180
Off Net Tariffs	248	367	405	349	320	278
East Africa Tariffs	351	616	884	761	731	725
International Tariffs	707	1,128	1,626	1,325	1,443	1,439



6.2 INTERNET SERVICES						
6.2a Estimate of Internet Users						
Year	2014	2015	2016	2017	2018	2019
Users	14,217,311	17,263,523	19,862,525	22,995,109	23,142,960	25,794,560
Penetration	29%	34%	40%	45%	43%	46%

Fig 6.2b: Estimated number of Internet Users

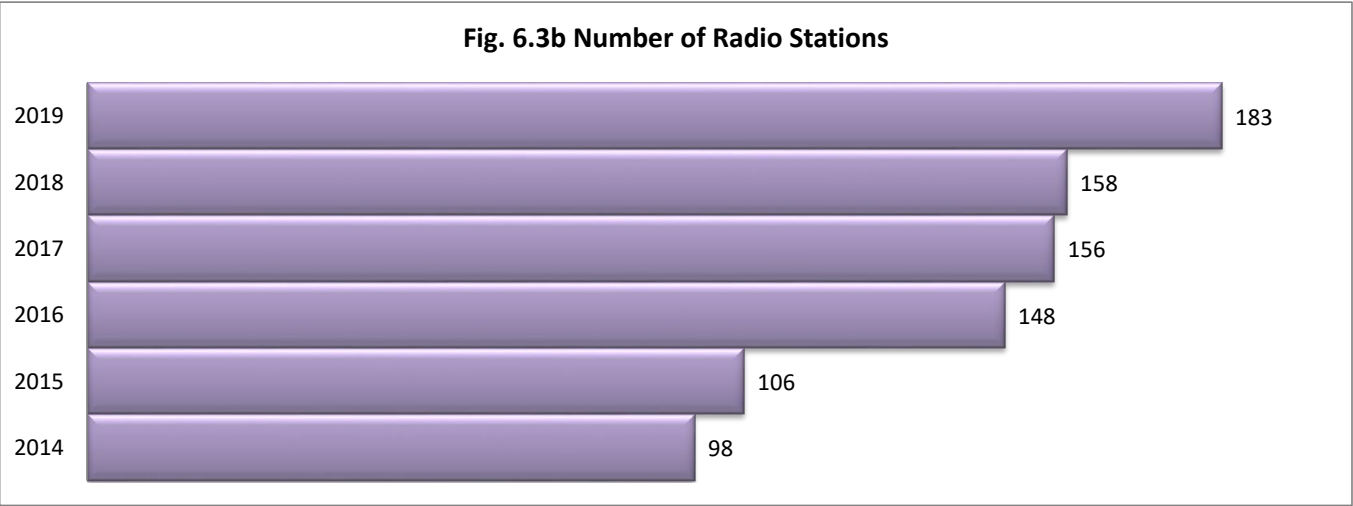


6.3 BROADCASTING SERVICES

6.3a Number of Digital Terrestrial Television (DTT), Digital To Home (DTH) and TV Stations

Type	2014	2015	2016	2017	2018	2019
Free To Air	25	25	25	27	30	37
Satellite TV	3	3	3	3	3	2
DTT & DTH	3	3	3	3	3	4

6.3b Number of Radio Stations



6.3c Number of Active TV Subscriptions/Active Decorders

Year	2014	2015	2016	2017	2018	2019
DTT	715,339	717,824	837,461	1,508,229	1,626,023	1,432,398
SATELLITE	187,754	192,571	224,667	570,124	985,594	1,092,891
CABLE	96,823	125,043	158,224	158,224	158,224	158,224
TOTAL	999,916	1,035,438	1,220,352	2,236,577	2,769,841	2,683,513

6.4 POSTAL SERVICES
6.4a Postal Service Providers

CATEGORY	2014	2015	2016	2017	2018	2019
Public	1	1	1	1	1	1
International	8	8	8	7	6	7
East Africa	3	4	2	1	2	3
Domestic	4	8	8	14	15	27
Intracity	4	6	9	5	4	9
Intercity	6	9	5	7	1	45
Total	26	36	33	35	28	92

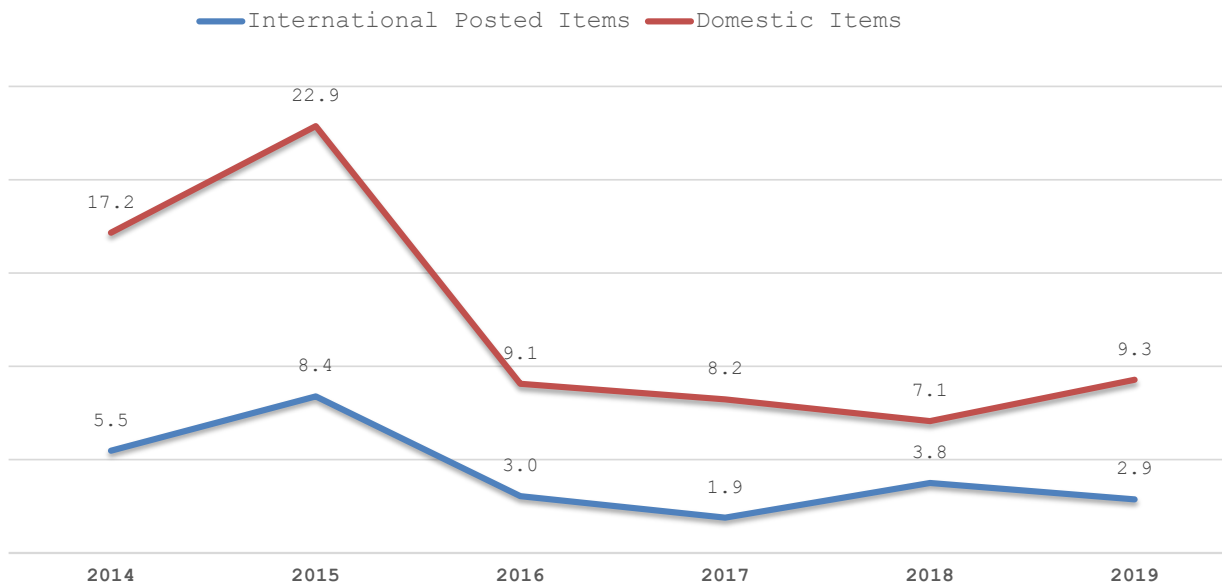
6.4b Public Postal Services Customers

Year	2014	2015	2016	2017	2018	2019
Corporate	694	158,487	16,423	80,307	51,321	1,672
Individuals	187,603	364,458	364,953	364,853	302,421	345,012
TOTAL	188,297	522,945	381,376	445,160	353,742	346,684

6.4c Domestic and International Posted Items in TPC

Item	2014	2015	2016	2017	2018	2019
Domestic Items	17,158,175	22,870,106	9,058,968	8,228,501	7,065,527	9,280,229
International Item	5,477,634	8,389,065	3,039,816	1,892,887	3,753,746	2,873,312
TOTAL	22,635,809	31,259,171	12,098,784	10,121,388	10,819,272	12,153,541

Fig 6.4c. Posted Items (Millions)



6.4d Items Posted to and Delivered from International

Year	2014	2015	2016	2017	2018	2019
Delivered from Int	7,363,436	9,014,973	4,240,327	2,339,149	7,999,942	3,927,692
Posted to Int	5,477,634	11,259,171	12,098,784	10,121,388	5,098,728	2,873,312
TOTAL	12,841,070	20,274,144	16,339,111	12,460,537	13,098,670	6,801,004

Fig. 6.4d Items posted to and Delivered from International

