

Measuring the Information Society Report 2018



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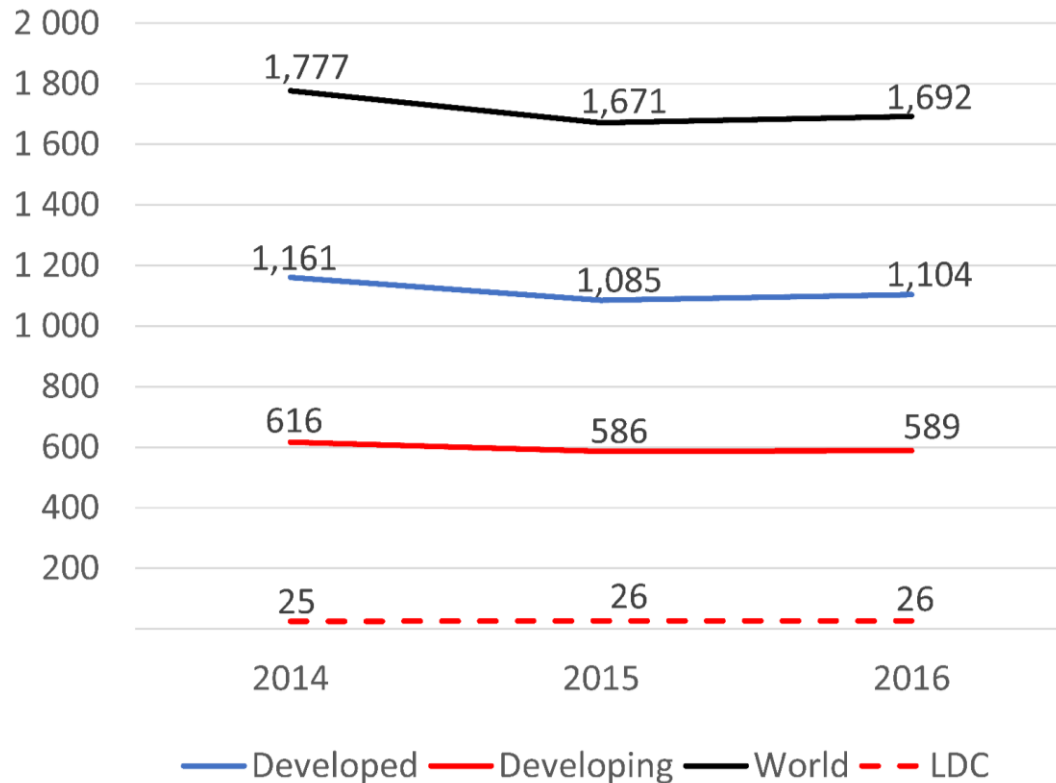
Chapter 3

REVENUE AND INVESTMENT TRENDS



Telecommunication revenues represents 2.3% of global GDP

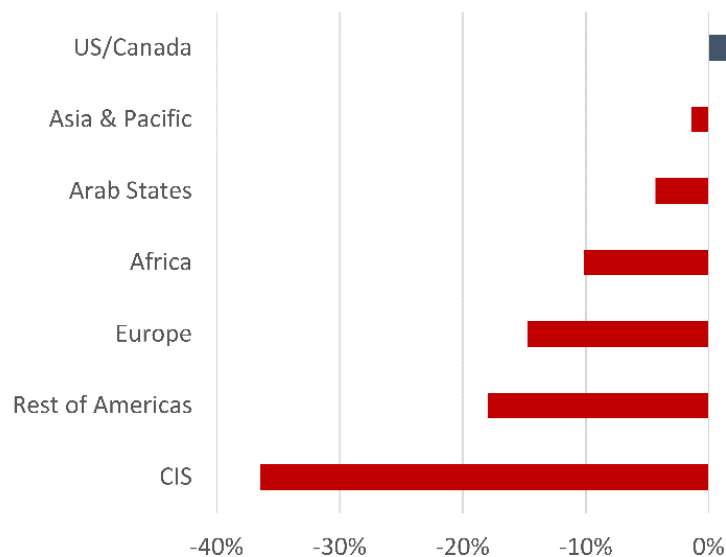
Total telecommunication revenues, USD billion



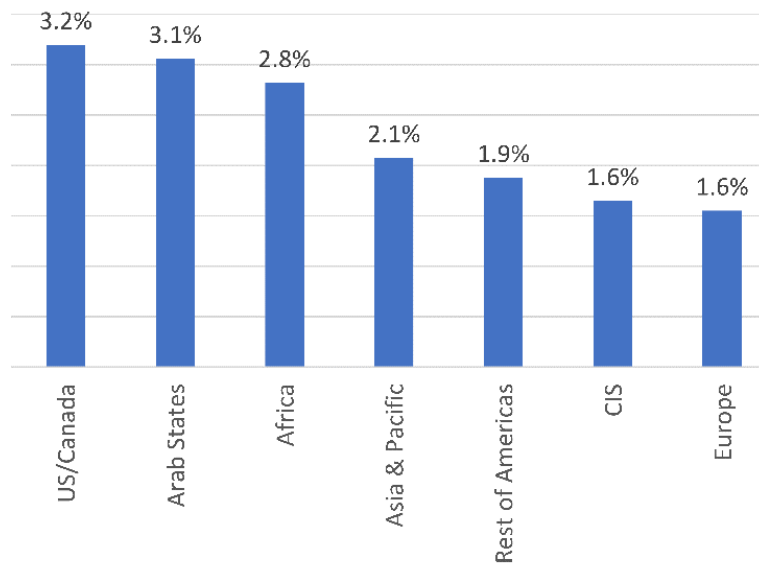
Sluggish telecommunication sector performance between 2014 - 2016

Regional telecommunication revenues, 2014-2016

Growth

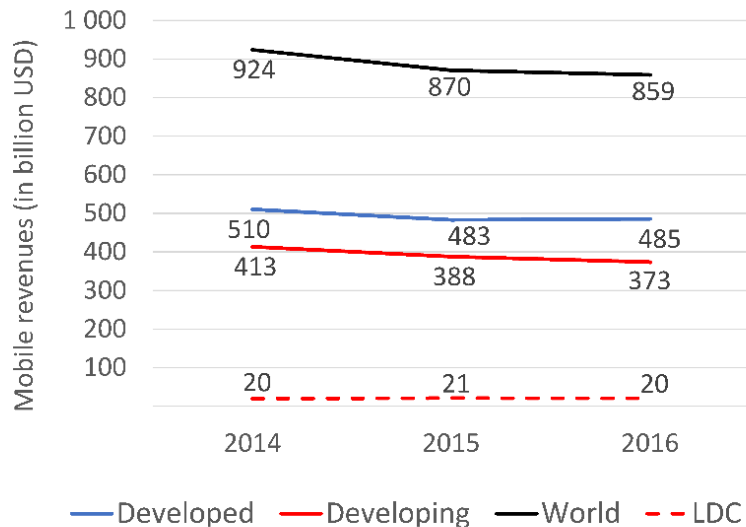


As % of GDP

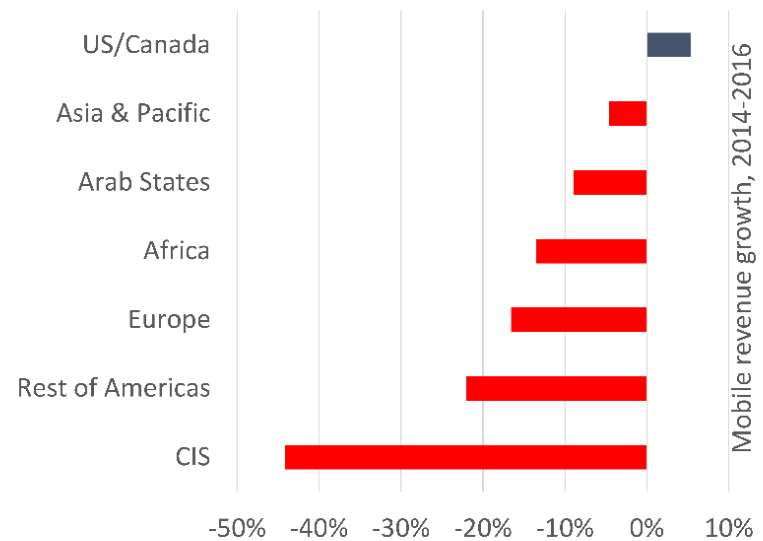


Mobile revenues declined by 7% between 2014 and 2016

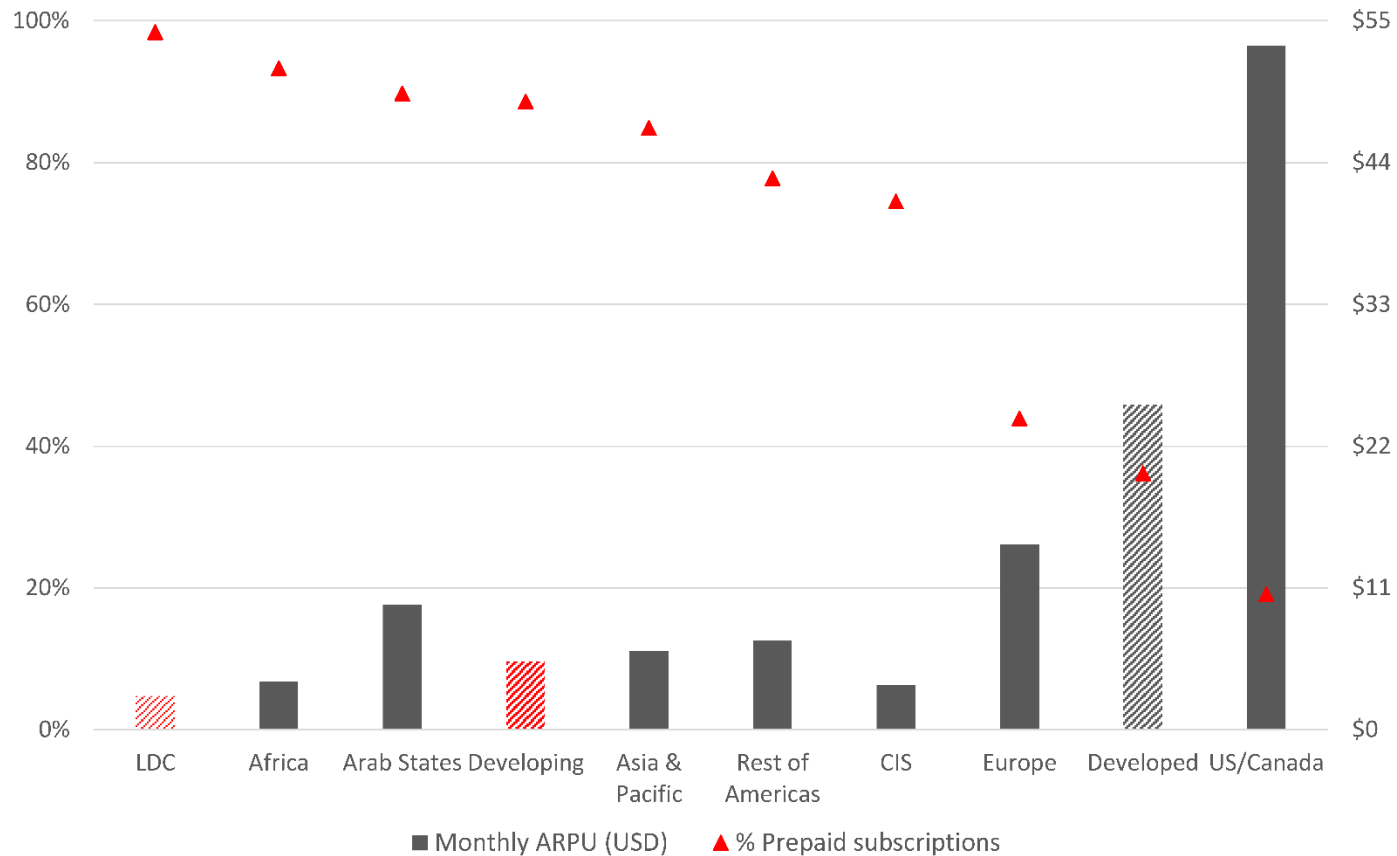
Mobile revenues, USD



Mobile revenues growth, 2014-2016

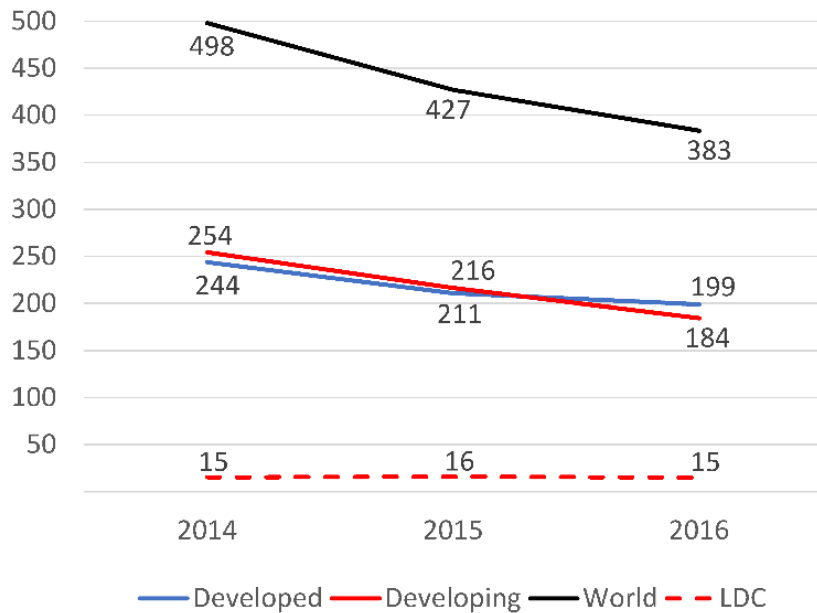


Share of prepaid subscription vs. monthly ARPU, 2016

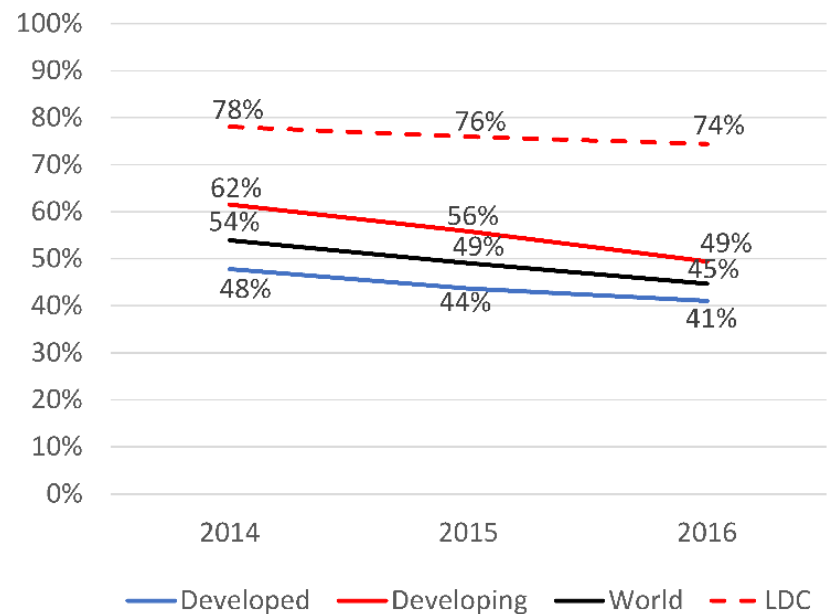


From voice to data revenues

Mobile voice revenues, USD billions

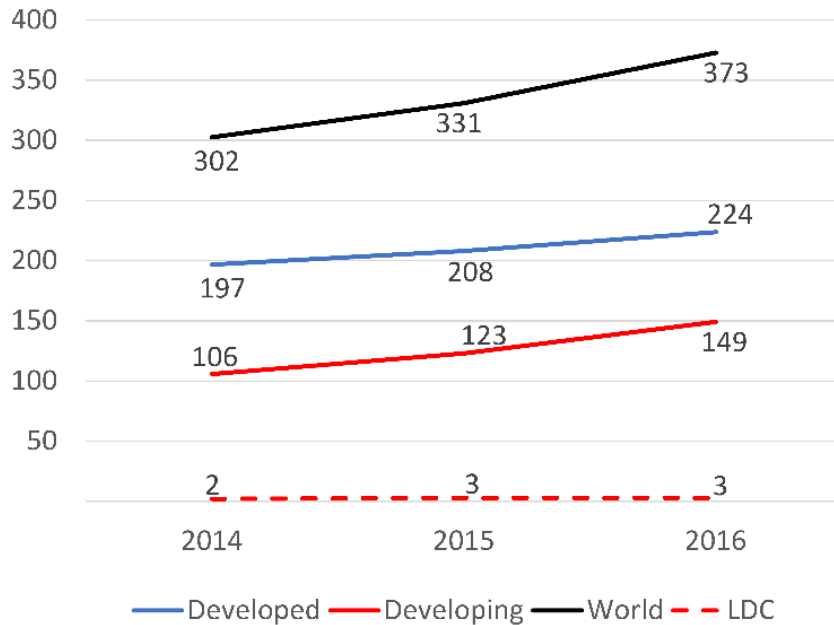


Voice revenues as % of mobile revenues

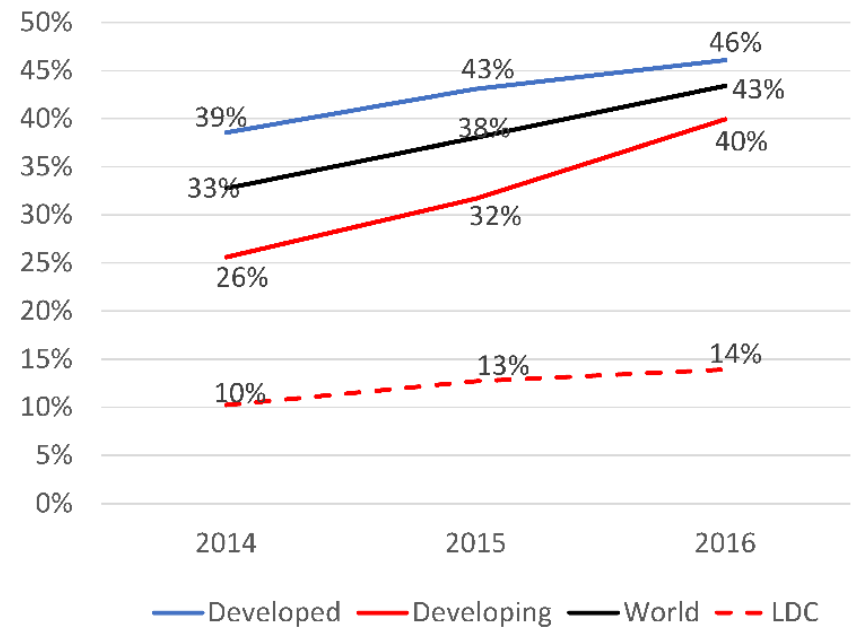


From voice to data revenues

Mobile data revenue, USD billions

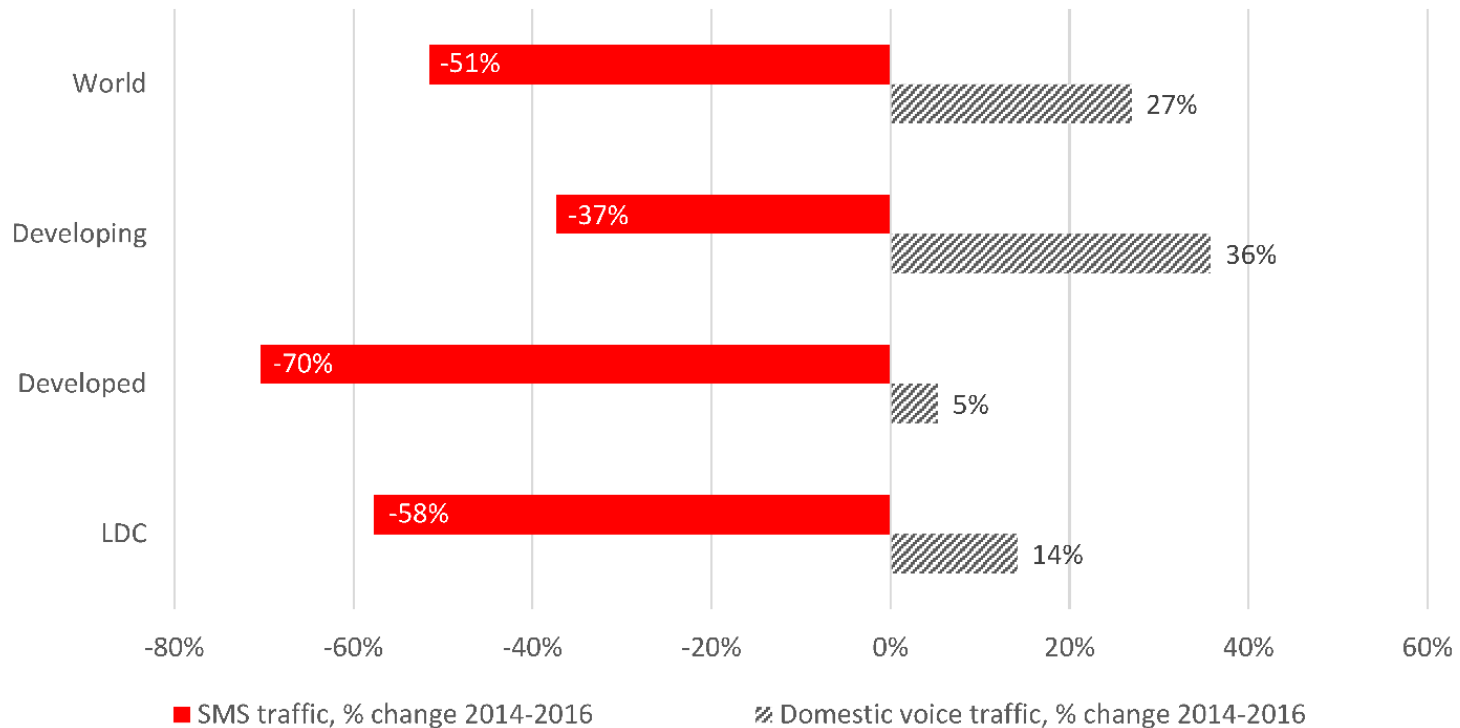


Data as % of mobile revenues

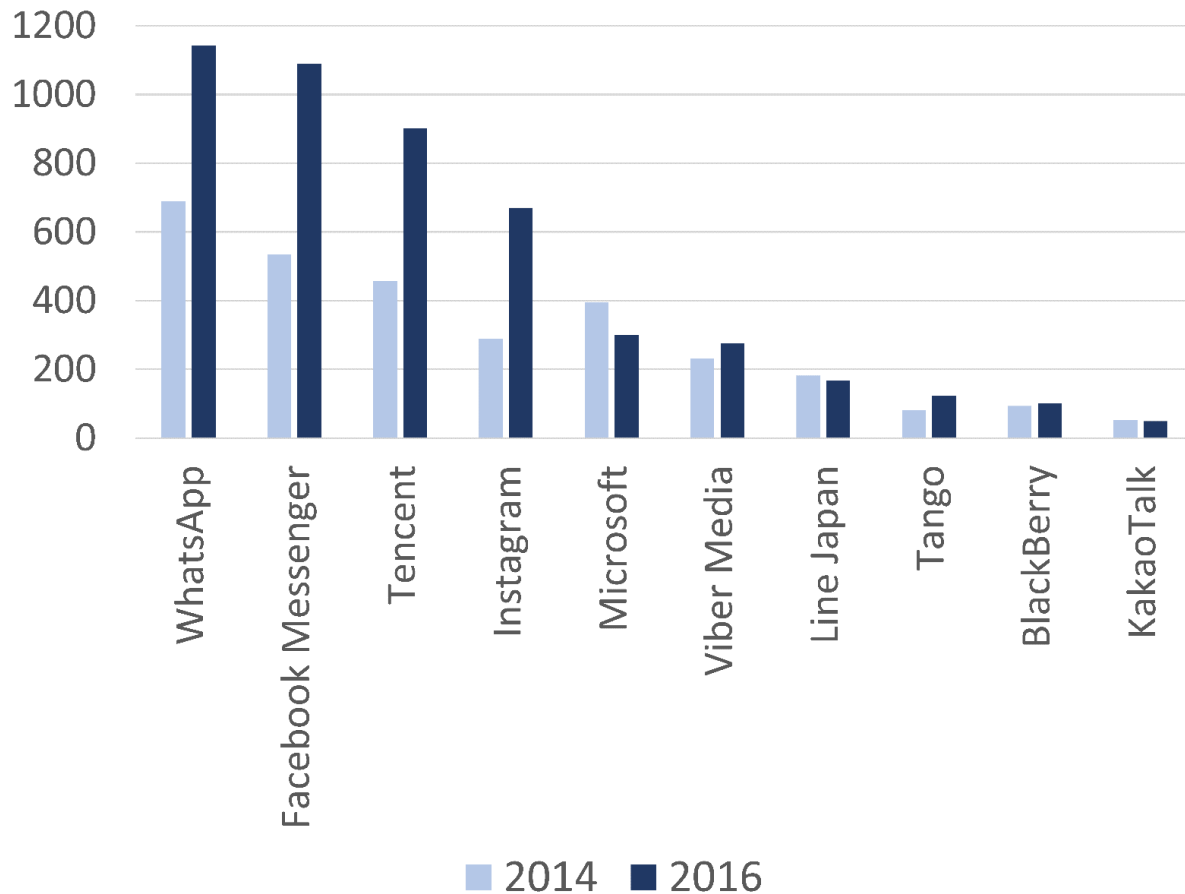


Mobile revenue is impacted by uptake in OTT services

Regional voice vs SMS traffic, % change 2014-2016



Global number of active users, in millions, selected OTT apps

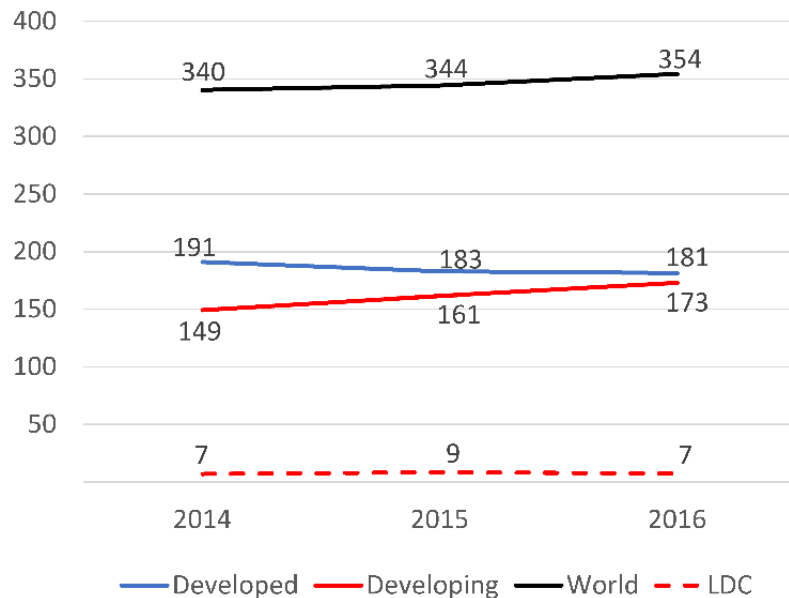


New revenue streams

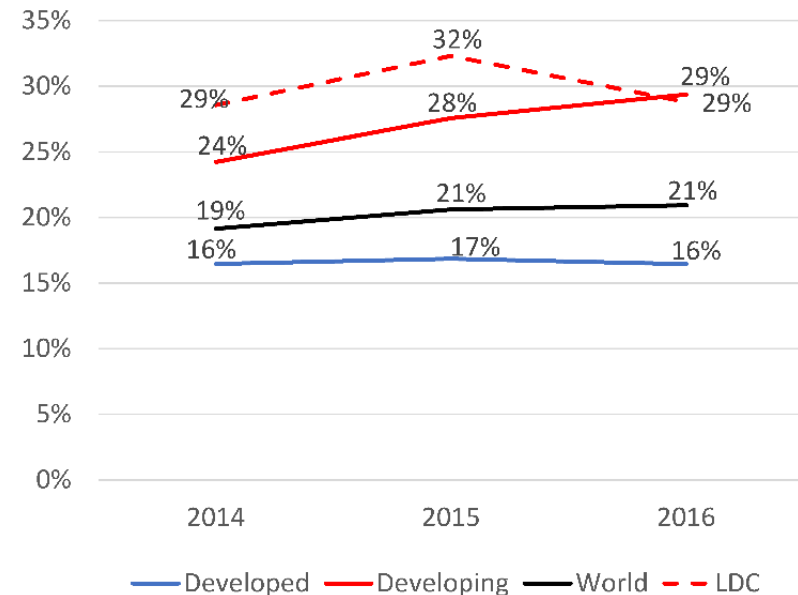
- Growth of the Internet of Things (IoT) and machine-to-machine (M2M) communications is creating revenue opportunities for service providers operating in mature markets
- May help to offset declining revenue trends in core business segments.
- As IoT revenue and investment opportunities are scaling up, certain enablers, such as Artificial Intelligence, big data analytics (BDA) and Blockchain, are gaining momentum.

Capex driven largely by data demand in developing economies

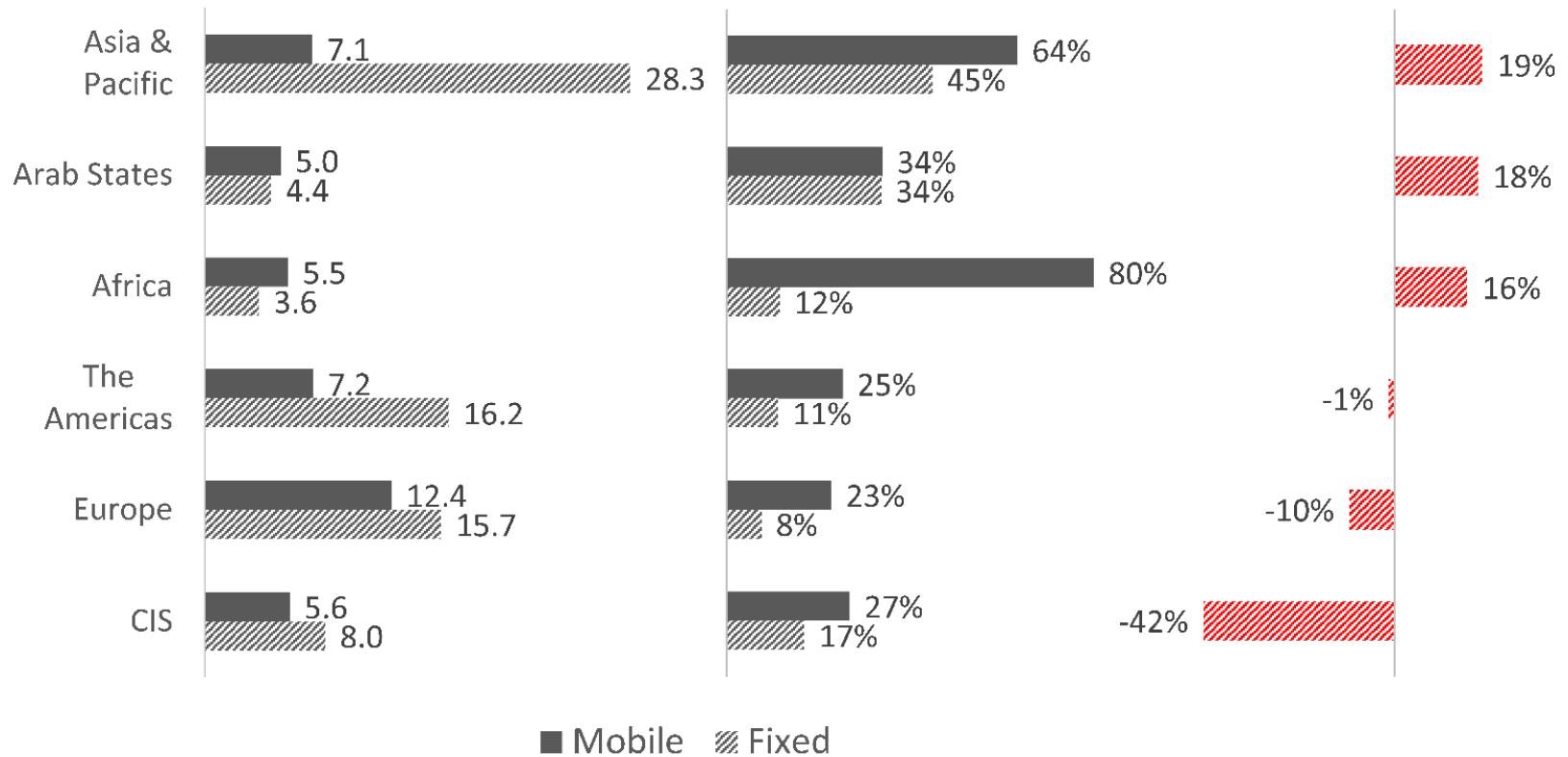
Telecom capex (USD billions)



Capex as % of telecom revenues



Regional growth in mobile broadband speeds, subscriptions and capex 2014-2016





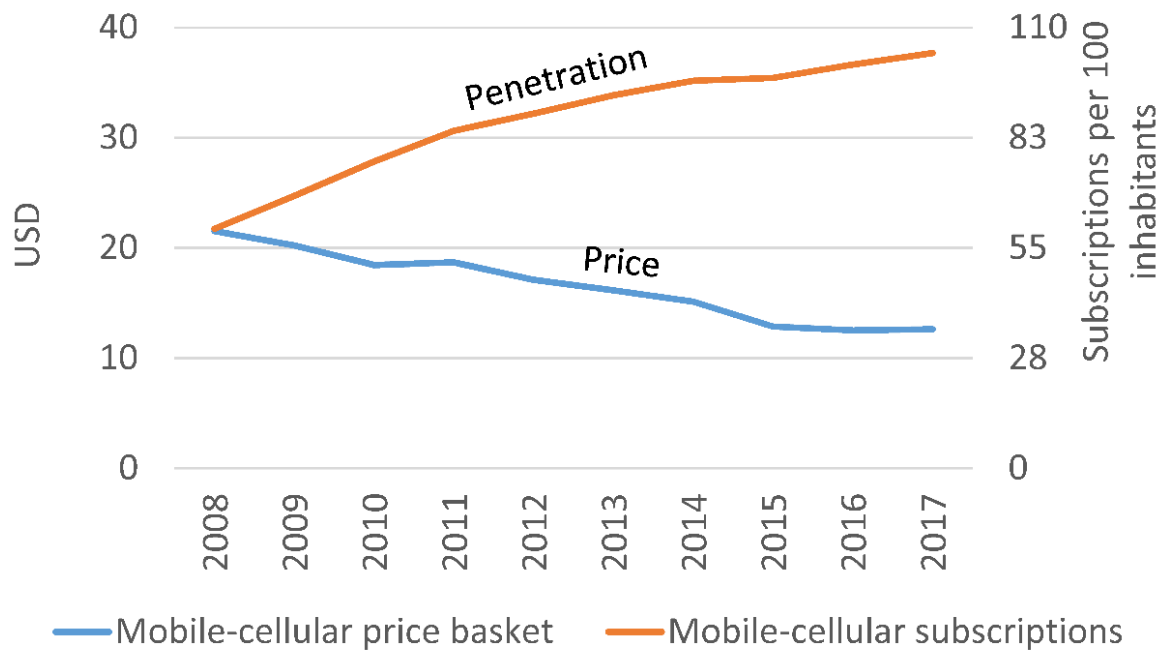
Chapter 4

ICT PRICE TRENDS



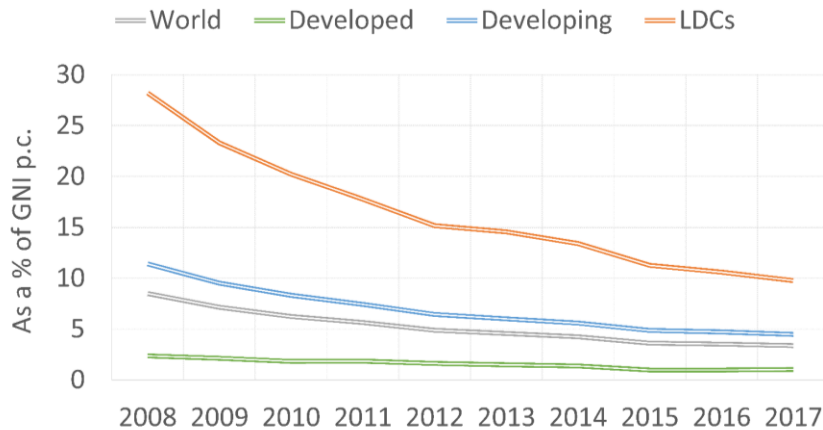
Steady downward trend in mobile prices, continuous increase in mobile-cellular penetration

Global mobile-cellular price basket and uptake

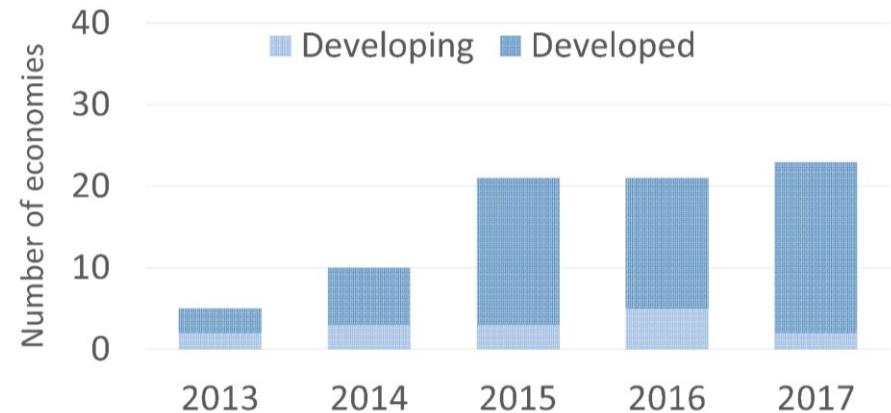


Mobile-cellular prices followed a sustained decreasing trend

Mobile-cellular basket, % of GNI p.c.

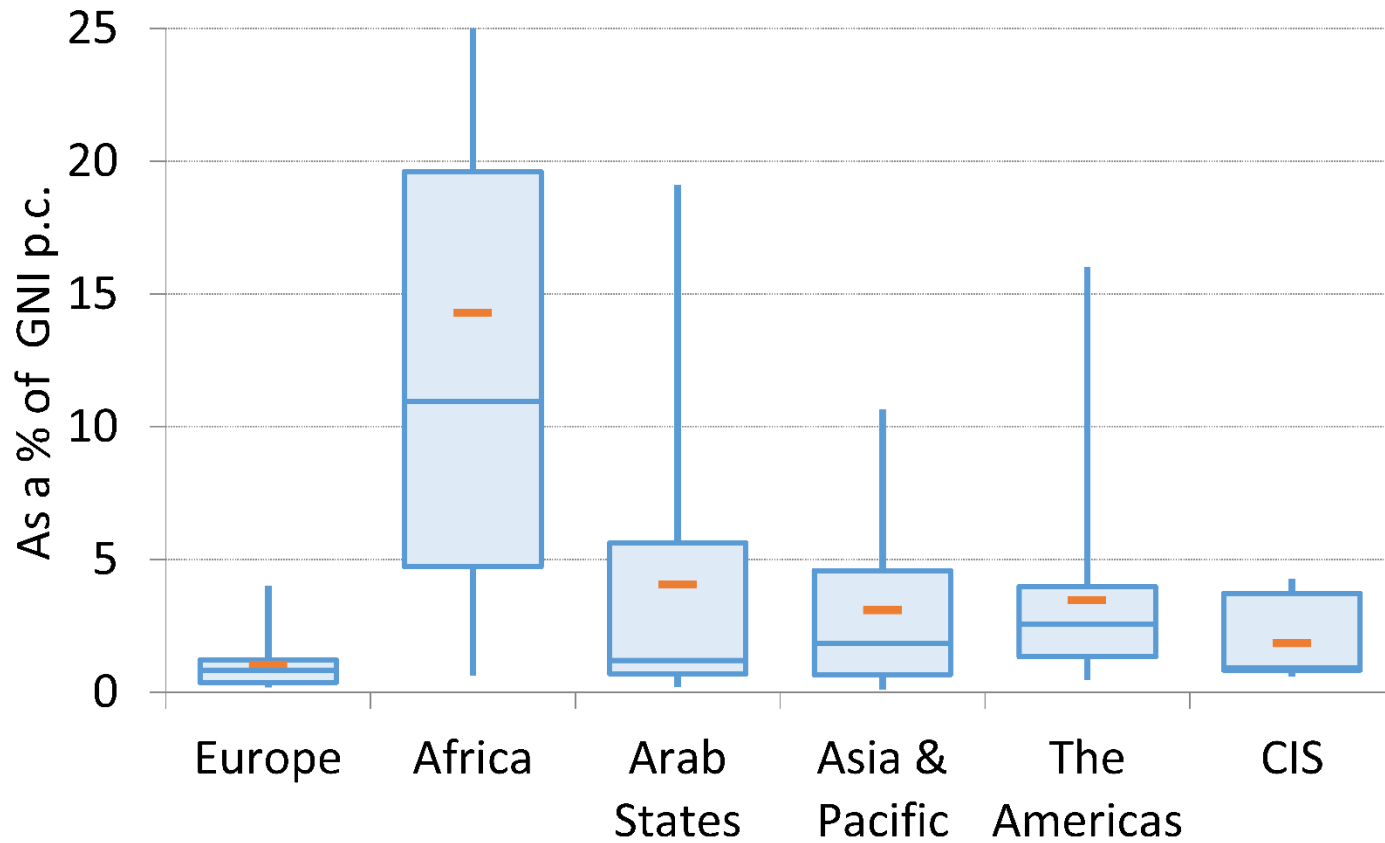


Economies with plans for mobile-cellular exceeding the basket requirements



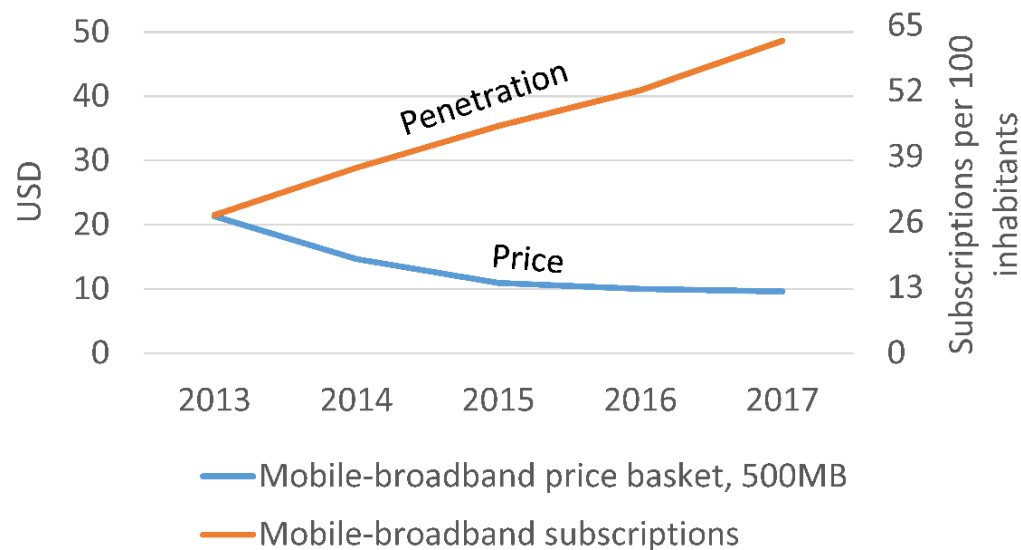
Mobile-cellular prices differ significantly across and within regions

Mobile-cellular basket, as % of GNI per capita, by region, 2017



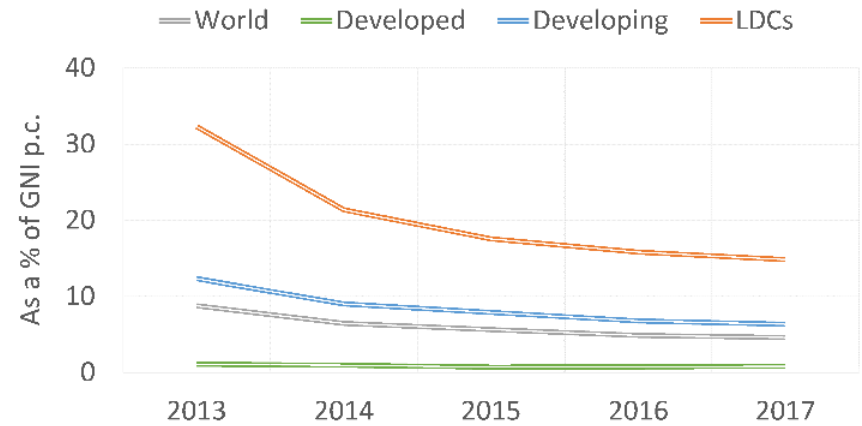
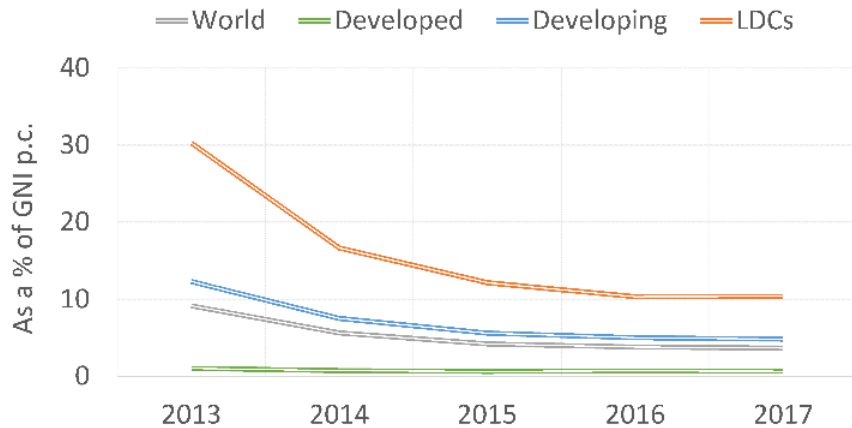
Decreasing mobile-broadband (handset-based) prices

Global mobile-broadband price basket (handset-based) and uptake



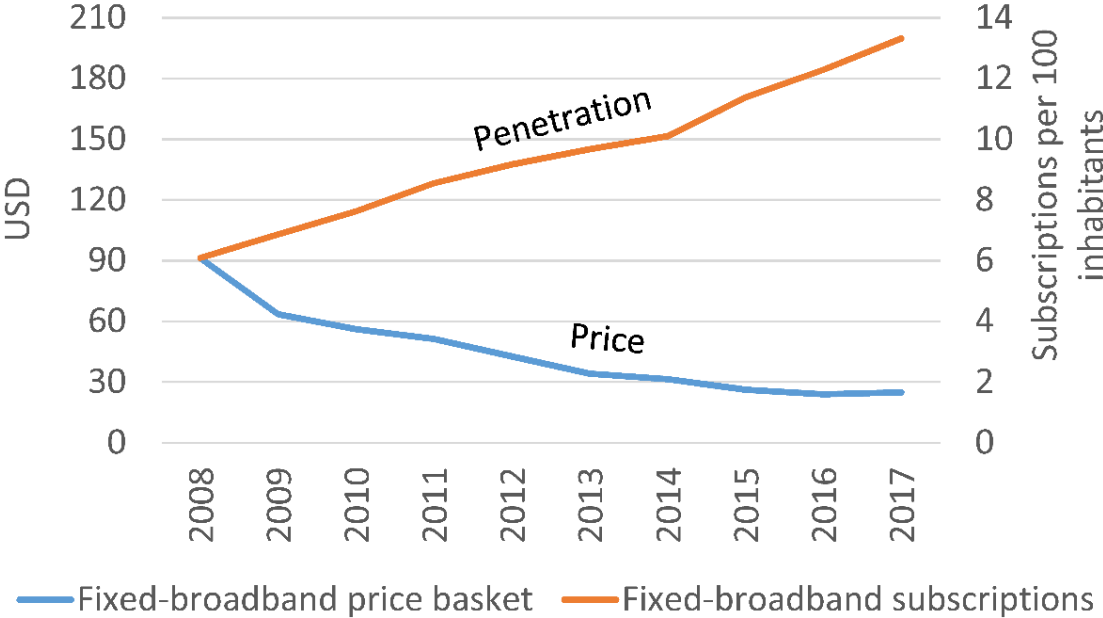
Mobile broadband prices follow similar trend

500 MB handset-based (left) and 1 GB computer-based (right) baskets, as % of GNI p.c.



Fixed broadband prices dropped while subscriptions doubled

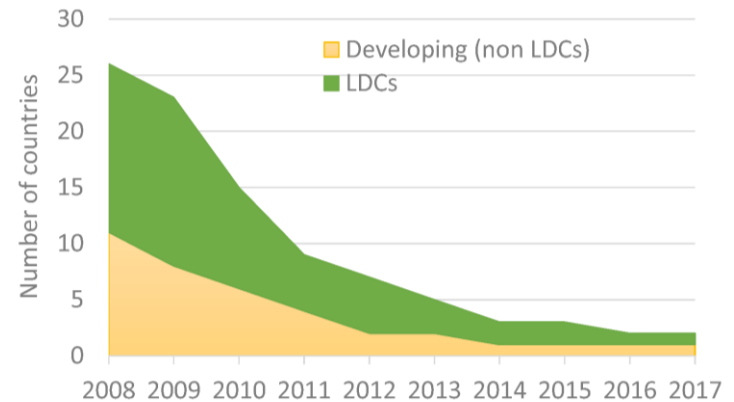
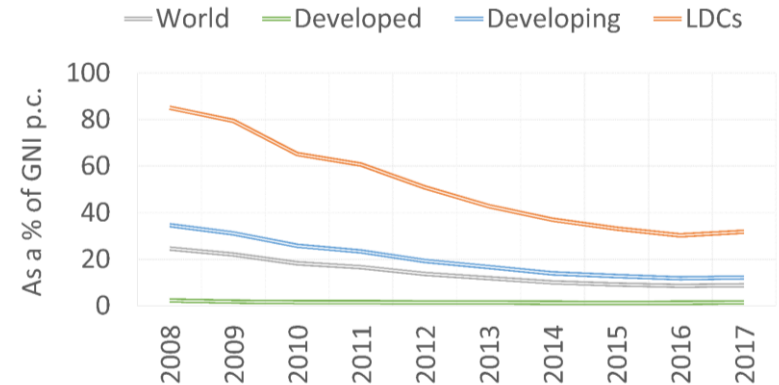
Global fixed-broadband price basket and uptake



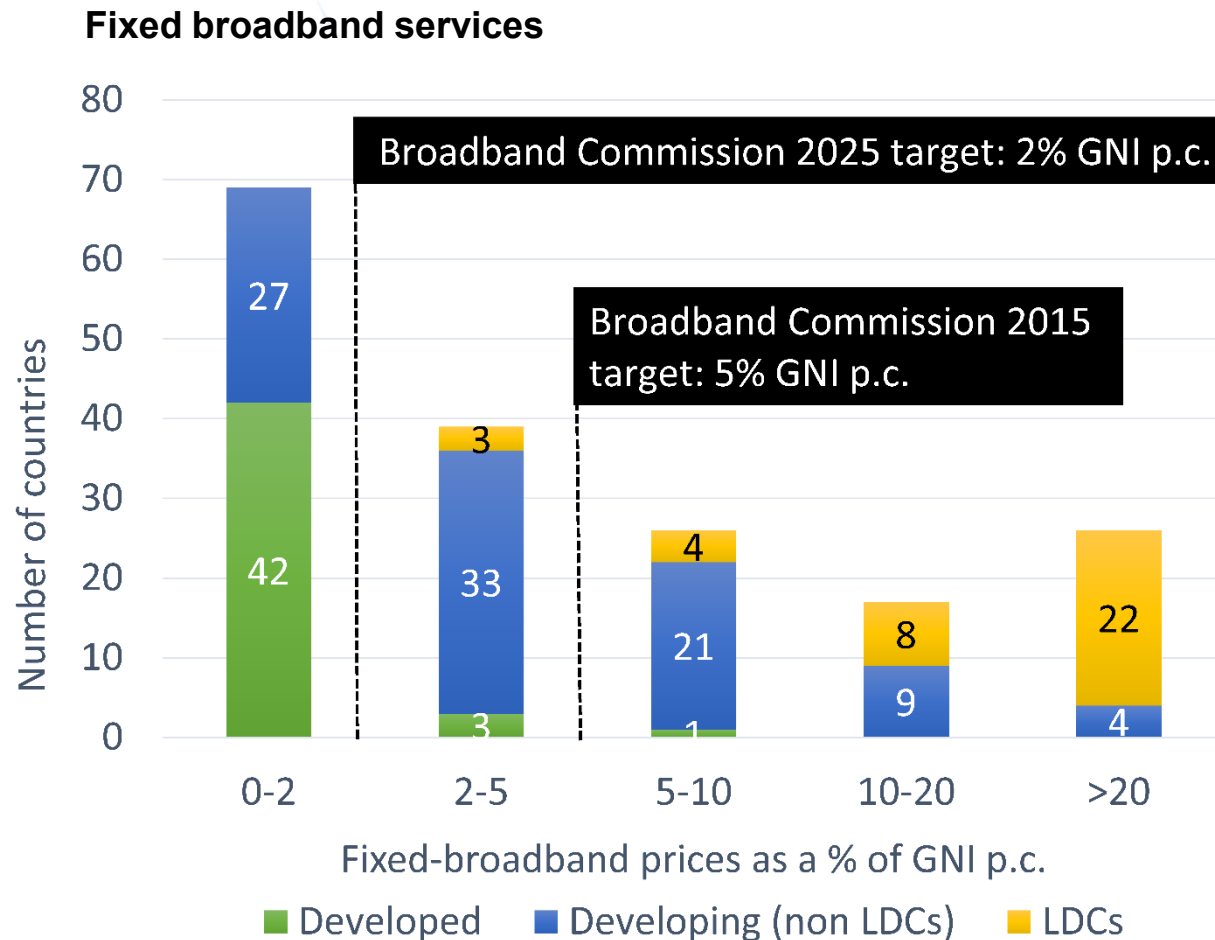
Fixed-broadband prices has significantly decreased worldwide in the last decade

- ...from USD 40 per month in 2008 to USD 25 per month in 2017
- ...most remarkable reduction in prices in LDCs, where prices have been cut by two-thirds since 2008
- ...however, entry level fixed broadband corresponds to 12% of GNI p.c.

Fixed-broadband basket as a % of GNI p.c.

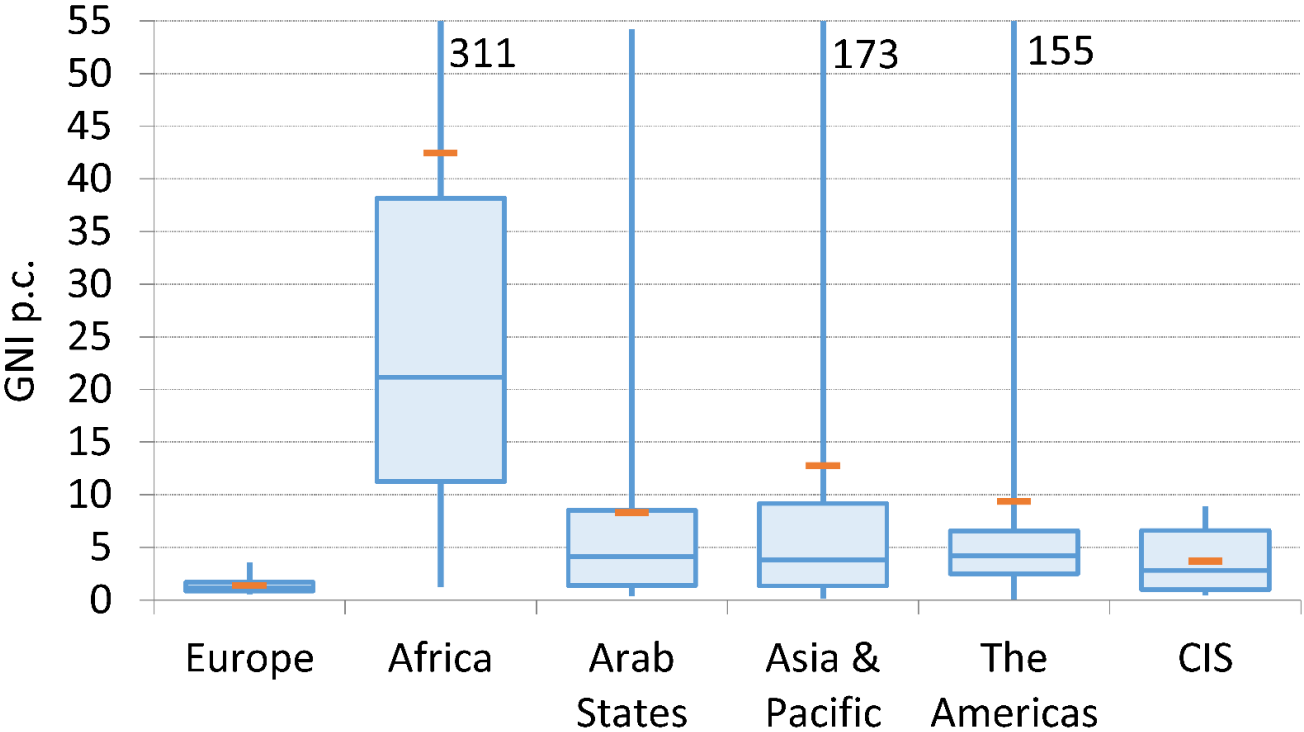


Countries having achieved the Broadband Commission targets



Fixed-broadband prices vary between regions

Fixed-broadband basket, as a % of GNI p.c.



ITU IPB Visualization Tool



ICT Price Baskets (IPB)

#ITUdata

IPB Rank

IPB Time Series

IPB Comparison

Basket :

Fixed-broadband basket

Year :

2017

Region :

IPB Global Rank

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Rank	Economy	% of GNI p.c.	USD	PPP\$	Tax rate included (%)	GNI p.c., USD, 2017*
1	Uruguay	0.00	0.00	0.00	22.00	N/A
2	Macao, China	0.14	7.85	9.68	0.00	N/A
3	Kuwait	0.36	9.33	14.39	0.00	N/A
4	Russian Federation	0.45	3.43	8.04	18.00	N/A
5	Hong Kong, China	0.46	17.71	21.39	0.00	N/A
6	Andorra	0.57	17.67	N/A	4.50	N/A
7	United Arab Emirates	0.58	18.79	24.59	0.00	N/A
8	Switzerland	0.68	45.70	31.83	8.00	N/A
9	Norway	0.69	43.40	34.18	25.00	N/A
10	Canada	0.73	26.08	24.97	13.00	N/A

<https://www.itu.int/net4/ITU-D/ipb/>



Thank you!

For more information:

<https://www.itu.int/en/ITU-D/Statistics/Pages/publications/misr2018.aspx>

