

Summary

Trends of Indian Telecom Industry for March 2019

- 1) Total subscriber base at 1,184 million; YoY decline of 1.9%; MoM de-growth of 1.8%
- 2) 17 out of 22 circles reported decline in subscriber base on MoM basis; Bihar reported the highest MoM decline
- 3) Overall tele-density declined to 90.1%; Urban tele-density at 160.0%, rural tele-density at 57.5%
- 4) Wireless subscriber base at – 1,162 million; YoY and MoM de-growth of 1.8% each
- 5) Active wireless subscriber base at 1,022 million; YoY growth of 2.4%; marginal MoM de-growth of 0.1%
- 6) Vodafone Idea leads the market with active wireless subscriber market share of 36.0%, followed by Bharti at 32.1% and RJio at 25.2%
- 7) Urban wireless subscriber base at 650.5 million; YoY de-growth of 1.8%; MoM de-growth of 0.9%
- 8) Rural wireless subscriber base at 511.3 million; YoY decline of 1.9%; MoM decline of 3.0%
- 9) Wireline Subscriber base at 21.7 million; YoY decline of 4.9%; BSNL/MTNL continue to be the market leader
- 10) Broadband subscriber base at 563.3 million; strong YoY growth of 37%
- 11) For December 2018 quarter, total minutes on network grew 35.3% YoY, while MoU per subscriber grew by 35.7%.
- 12) For December 2018 quarter, data subscriber base and per subscriber usage continued to report healthy YoY growth

Revenue trends for Indian Telecom Industry for quarter ending December 2018

- 1) Total AGR at Rs. 34,008 crore; YoY de-growth of 6.3%, AGR decline witnessed for all telcos except RJio
- 2) Vodafone Idea remains the revenue market leader with a 30.5% share, followed by Bharti and RJio with 29.8% and 28.4% share respectively

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