

QUARTERLY COMMUNICATIONS STATISTICS

January-March 2020 Operators' Submissions

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

A: TELECOM SERVICES

1. TARIFFS (in Tshs)

1.1. Voice and SMS Basic Tariffs (Tax inclusive) as of March 2020

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

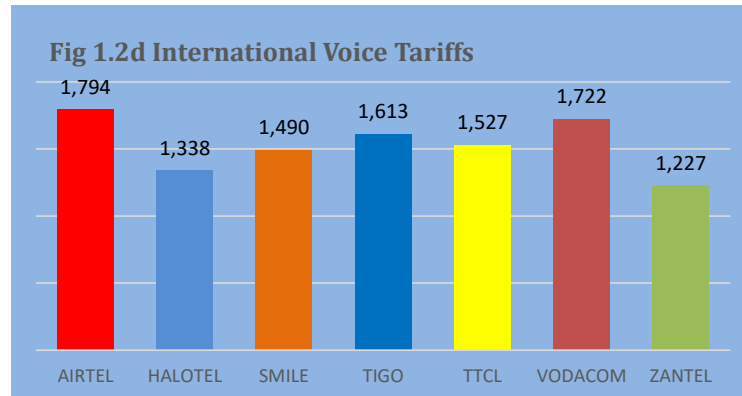
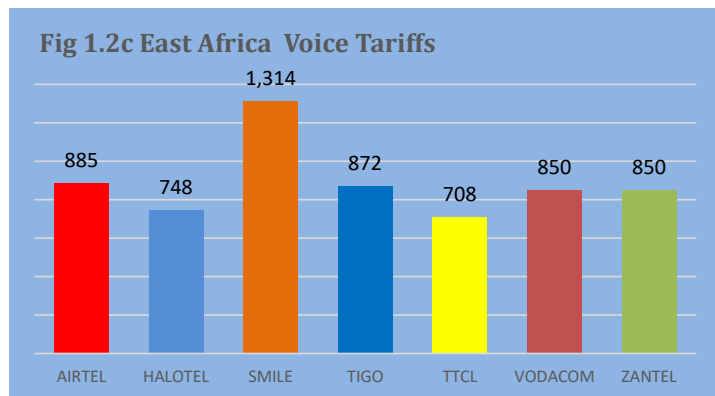
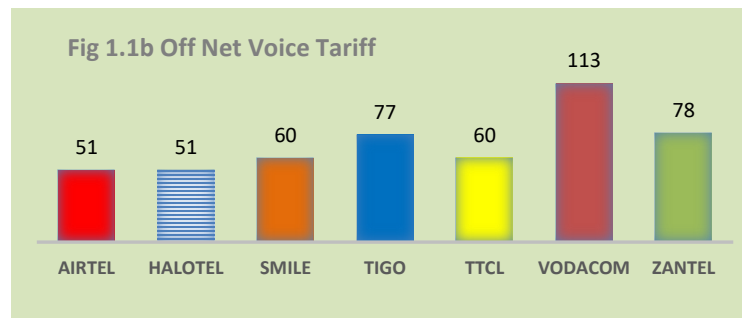
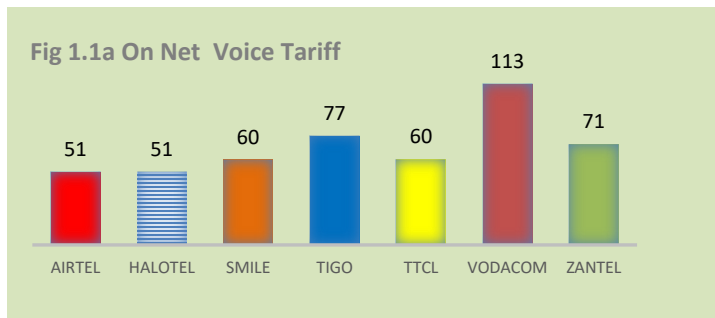


Fig 1.3e Local SMS Tariffs

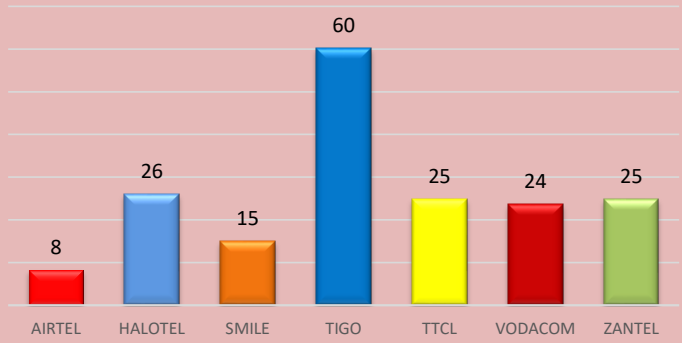
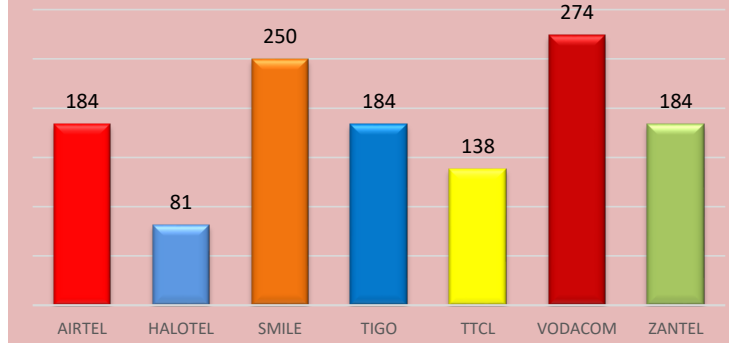


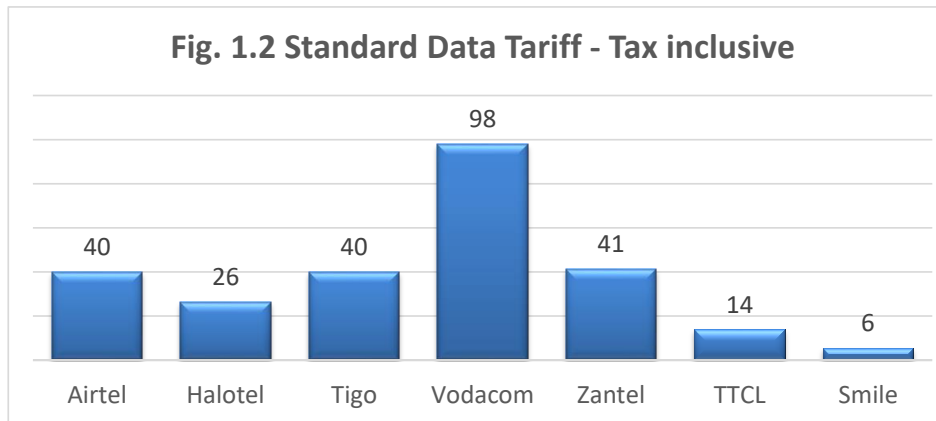
Fig 1.3f International SMS Tariffs



1.2 Standard Data Tariff as of March 2020 (Tax inclusive)

Operator	Price/MB
Airtel	40
Halotel	26
Tigo	40
Vodacom	98
Zantel	41
TTCL	14
Smile	6

Fig. 1.2 Standard Data Tariff - Tax inclusive

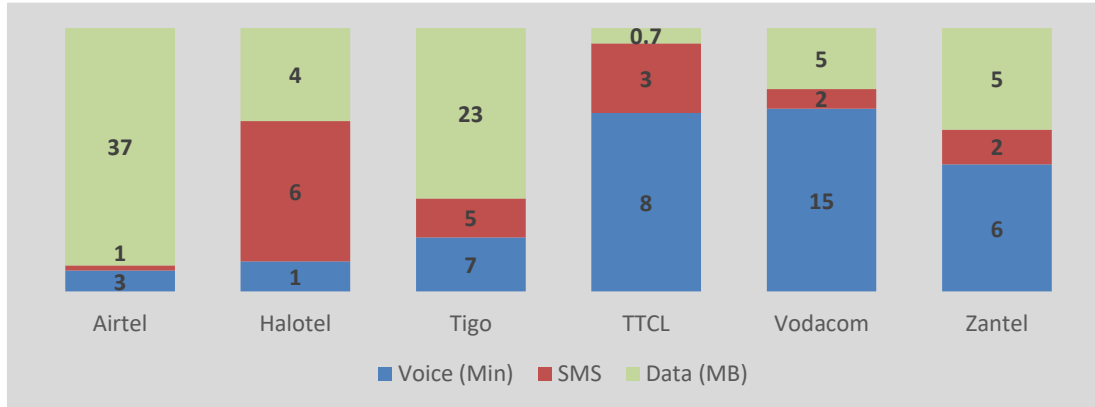


1.3 Bundle Tariff

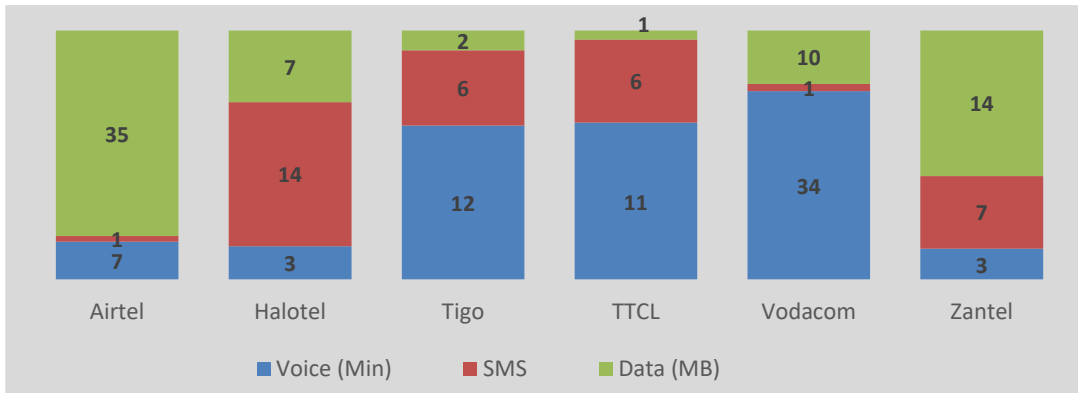
1.3.1 Estimated and disaggregated Average Bundle Tariffs (Tax inclusive) as of March 2020

These are average tariffs combined from daily, weekly and monthly bundle and disaggregated to Minutes, SMS and MBs with the assumption that ratio of each of these three components in the bundle are construed from standard tariffs

1.3.1a On Net Estimates of disaggregated bundle



1.3.1b Off Net Estimates of disaggregated bundle



1.4 Industry Weighted Average Tariffs (IWAT)

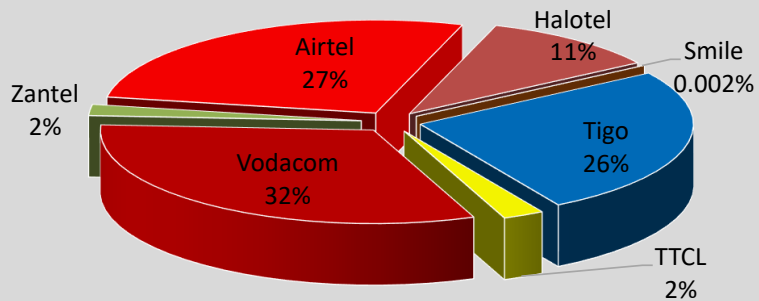
Destination	Basic Tariffs/1Minute	Bundle Tariffs/1minute, 1SMS and 1MB
On Net	69	22
Off Net	70	29
EA	889	
Other Int.	1,530	
Local SMS	26	
International SMS	185	

2. TELECOM SUBSCRIPTIONS

2.1. Number of Telecom Subscriptions and Market Shares

Operator	JANUARY	FEBRUARY	MARCH
Airtel	13,020,034	13,270,795	13,390,131
Halotel	4,789,454	4,947,657	5,199,112
Smile	1,136	807	829
Tigo	12,683,382	12,609,225	12,641,426
TTCL	1,093,813	1,144,105	1,190,427
Vodacom	15,966,195	15,888,841	15,591,430
Zantel	1,161,863	1,139,679	926,175
TOTAL	48,715,877	49,001,109	48,939,530

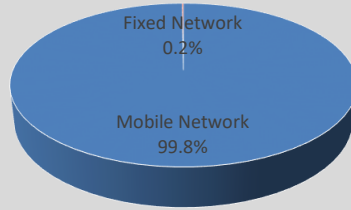
Fig. 2.1 Operators' Subscription Market Shares



2.2 Subscriptions to Mobile and Fixed Network

NETWORK	JANUARY	FEBRUARY	MARCH
Mobile Network	48,640,209	48,925,429	48,863,584
TTCL	75,668	75,680	75,946
ZANTEL	0	0	0
Fixed Network	75,668	75,680	75,946
TOTAL	48,715,877	49,001,109	48,939,530

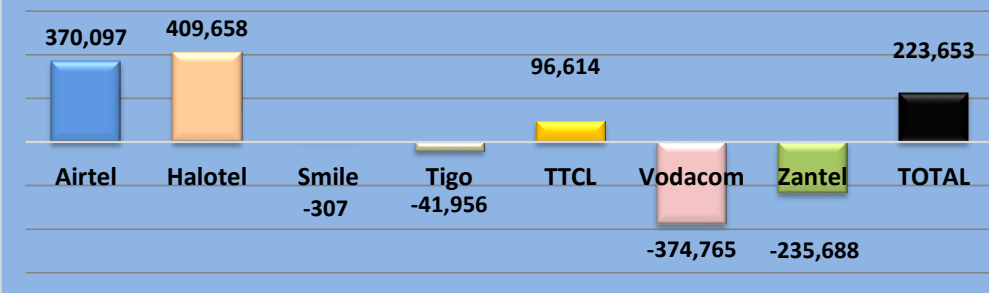
Fig.2.2: Mobile and Fixed Operators Subscription Market Shares



2.3 Addition of Subscriptions per Operator in this quarter (January-March 2020)

Operator	FEBRUARY	MARCH	Quarter Net Addition
Airtel	250,761	119,336	370,097
Halotel	158,203	251,455	409,658
Smile	-329	22	-307
Tigo	-74,157	32,201	-41,956
TTCL	50,292	46,322	96,614
Vodacom	-77,354	-297,411	-374,765
Zantel	-22,184	-213,504	-235,688
TOTAL	285,232	-61,579	223,653

Fig. 2.3 Net Addition of Subscriptions in this quarter

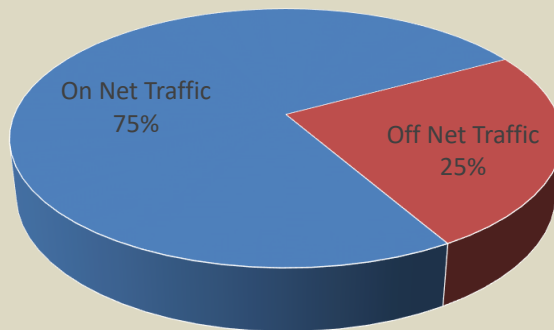


3. TRAFFIC MINUTES

3.1 Local Traffic

Destination	JANUARY	FEBRUARY	MARCH	TOTAL
On Net Traffic	4,544,174,118	4,041,895,666	4,658,607,195	13,244,676,979
Off Net Traffic	1,172,278,645	1,321,038,465	1,824,791,390	4,318,108,500
TOTAL	5,716,452,763	5,362,934,131	6,483,398,585	17,562,785,479

Fig. 3.1 Local Traffic Minutes Proportions



3.2 International Traffic

Destination	JANUARY	FEBRUARY	MARCH	TOTAL
Traffic to EA	939,057	944,845	921,271	2,805,173
Traffic From EA	1,445,946	1,383,032	1,388,784	4,217,762
Traffic to other Int	2,257,579	2,040,211	2,631,483	6,929,273
Traffic From Othe Int	3,705,298	3,360,571	3,577,405	10,643,274
TOTAL	8,347,880	7,728,659	8,518,943	24,595,482

Fig 3.2a Traffic Minutes to/From EA Countries

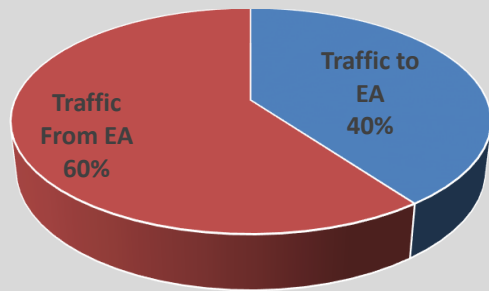
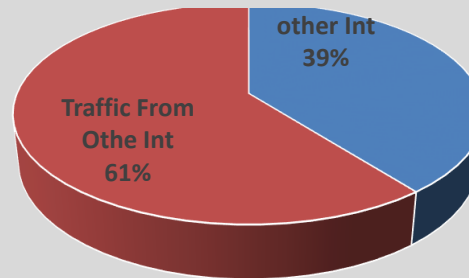


Fig 3.2b Traffic Minutes to/From other Internationals



3.3 Percentage Shares of Traffic Minutes Per Operators as of March 2020

3.3(a) Local Traffic Minutes

Fig 3.3a On net Traffic Shares

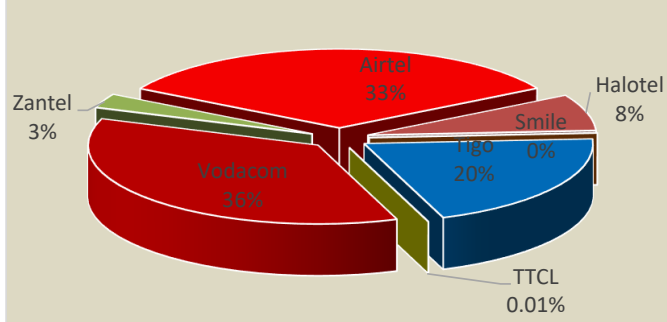
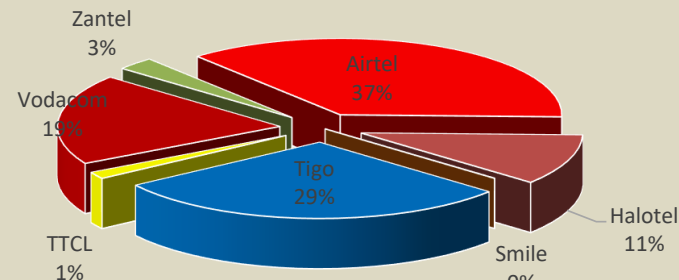
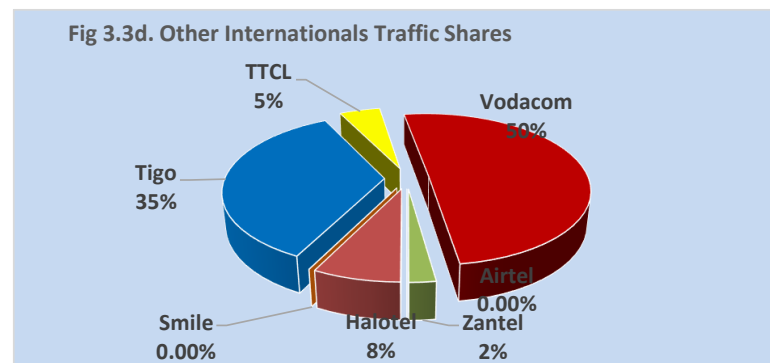
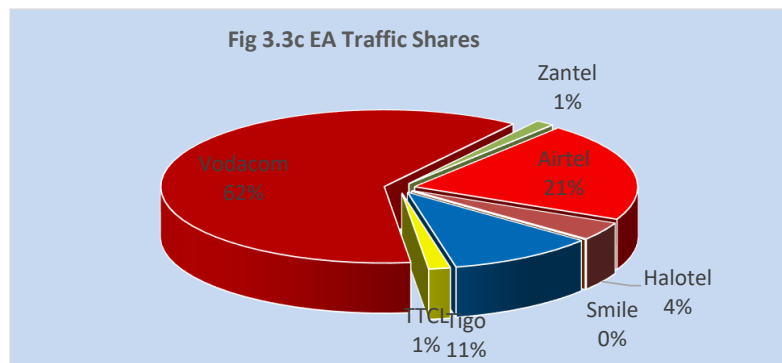


Fig 3.3b. Off Net Traffic Shares



3.3(b) International Traffic Minutes



3.4 Minutes Used Per Subscriptions (Minutes of Use)

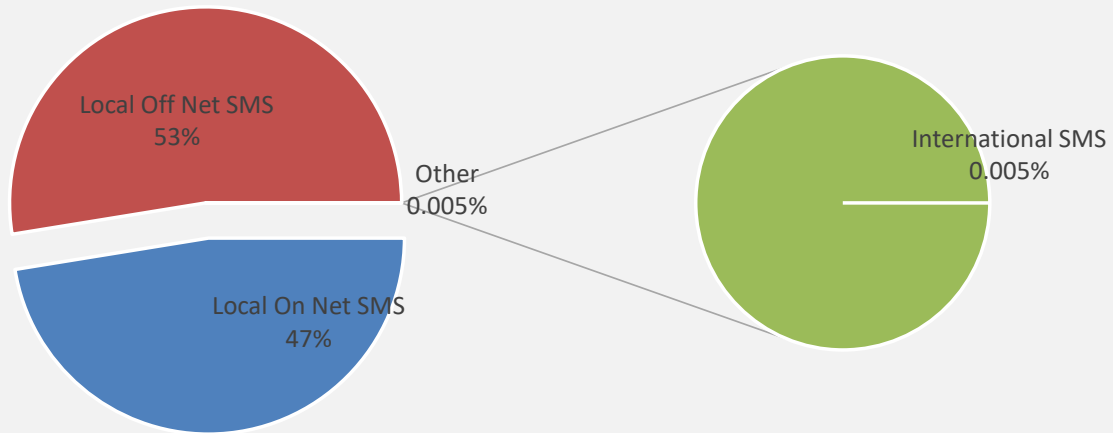
Destination	JANUARY	FEBRUARY	MARCH	TOTAL
On net	93	82	95	271
Off Net	24	27	37	88
EA	0.02	0.02	0.02	0.06
Other Internationals	0.03	0.03	0.03	0.09
TOTAL	117	109	133	359

4. SHORT MESSAGES (SMS)

4.1 Local and International SMS

Destination	JANUARY	FEBRUARY	MARCH	TOTAL
Local On Net SMS	5,486,288,673	4,722,118,266	5,172,986,417	15,381,393,356
Local Off Net SMS	5,950,835,676	5,235,695,602	5,854,181,017	17,040,712,295
International SMS	557,744	512,573.0	394,542.0	1,464,859
TOTAL	11,437,682,093	9,958,326,441	11,027,561,976	32,423,570,510

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

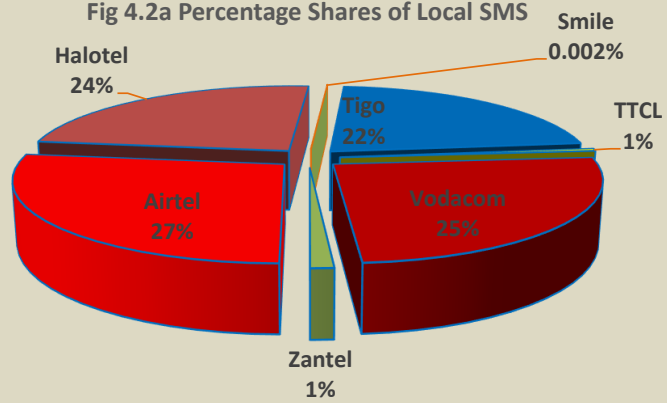
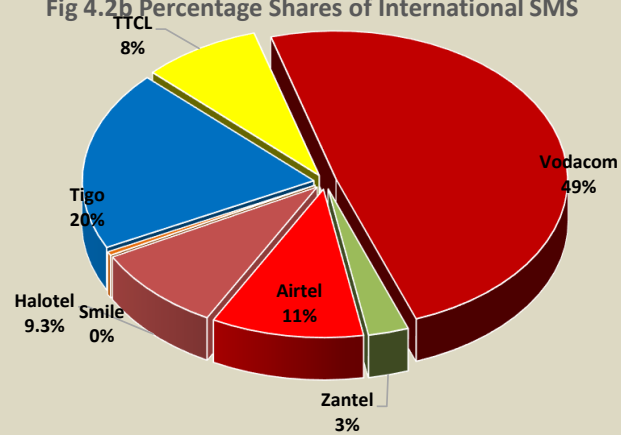


Fig 4.2b Percentage Shares of International SMS

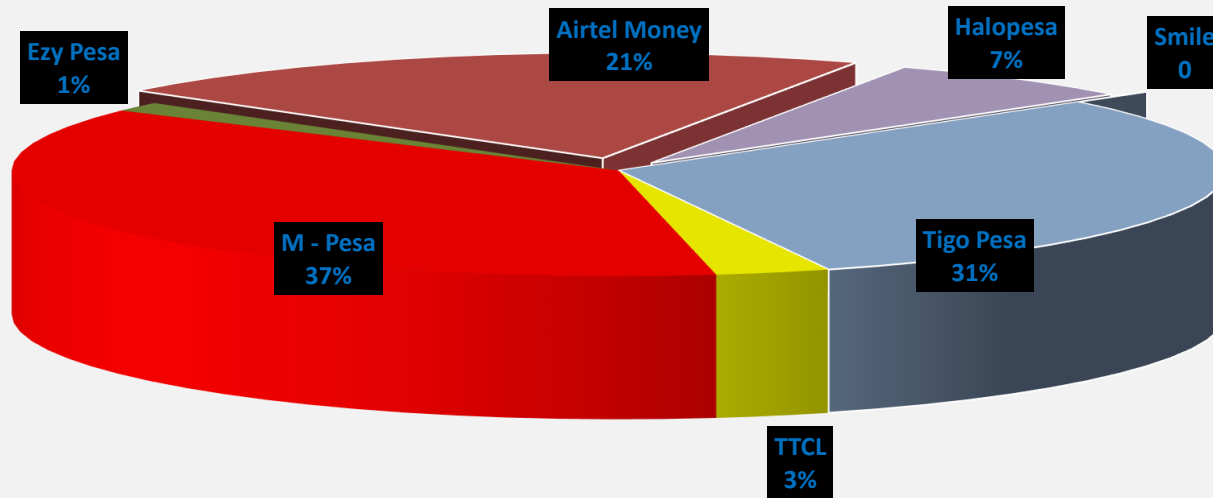


5. MOBILE MONEY SERVICES

5.1 Mobile Money Subscriptions (Mobile Money Accounts)

Operator	JANUARY	FEBRUARY	MARCH
Airtel Money	5,345,519	5,549,511	5,626,586
Halopesa	1,719,627	1,816,078	1,853,290
Smile	0	0	0
Tigo Pesa	7,959,370	7,954,048	8,330,330
TTCL	756,352	791,805	825,888
M - Pesa	10,326,928	10,157,671	10,102,681
Ezy Pesa	395,981	401,969	388,523
TOTAL	26,503,777	26,671,082	27,127,298

Fig. 5.1 Mobile Money Subscriptions Market Share as of March 2020



5.2 Mobile Money Transactions

Operator	JANUARY	FEBRUARY	MARCH
Airtel Money	49,979,065	50,643,194	56,914,579
Halopesa	13,333,676	13,585,755	14,809,315
Smile	0	0	0
Tigo Pesa	78,991,516	70,074,203	75,107,094
TTCL	945,478	838,669	825,501
M - Pesa	124,414,825	101,360,184	106,352,098
Ezy Pesa	2,844,783	2,843,962	2,956,294
TOTAL	270,509,343	239,345,967	256,964,881

5.3 Mobile Money Value of Transactions

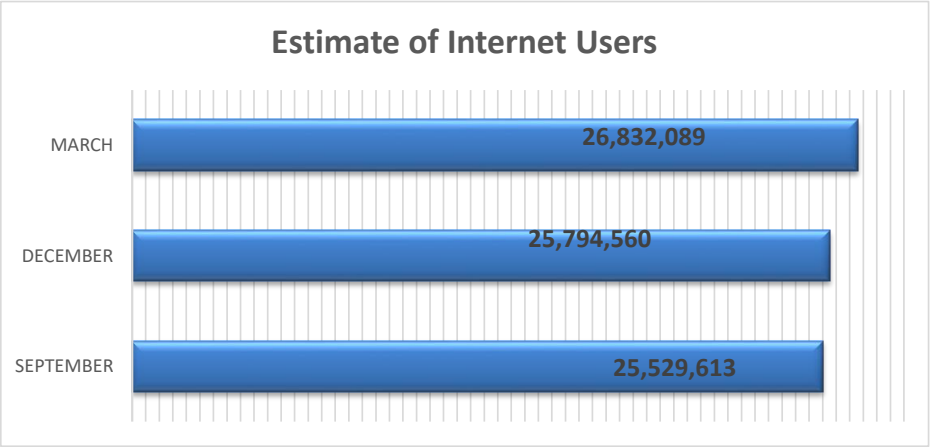
Operator	JANUARY	FEBRUARY	MARCH
Airtel Money	1,568,389,507,046	1,511,952,671,962	1,642,225,613,794
Halopesa	164,608,868,885	173,248,128,211	194,598,762,724
Smile	0	0	0
Tigo Pesa	2,051,344,393,852	1,846,759,373,602	1,995,840,604,555
TTCL	9,757,758,900	10,823,441,842	10,955,123,254
M - Pesa	5,450,561,266,308	4,675,239,545,169	5,084,530,555,683
Ezy Pesa	90,994,751,652	88,298,671,493	89,734,186,856
TOTAL	9,335,656,546,643	8,306,321,832,279	9,017,884,846,866

5.3 Mobile Money Transaction and Value per Subscription

	JANUARY	FEBRUARY	MARCH
Transaction/Subs	10	9	9
Value/Subs	352,239	311,436	332,428

6. ESTIMATES OF INTERNET USERS

SEPTEMBER	DECEMBER	MARCH
2019	2019	2020
25,529,613	25,794,560	26,832,089



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	48,863,584
Total	34,251,801	39,808,419	40,173,783	40,080,954	43,621,499	48,939,872
Penetration	71%	79%	80%	78%	81%	88%

Fig.6.1a Trend of Subscription on mobile and Fixed Lines in Million

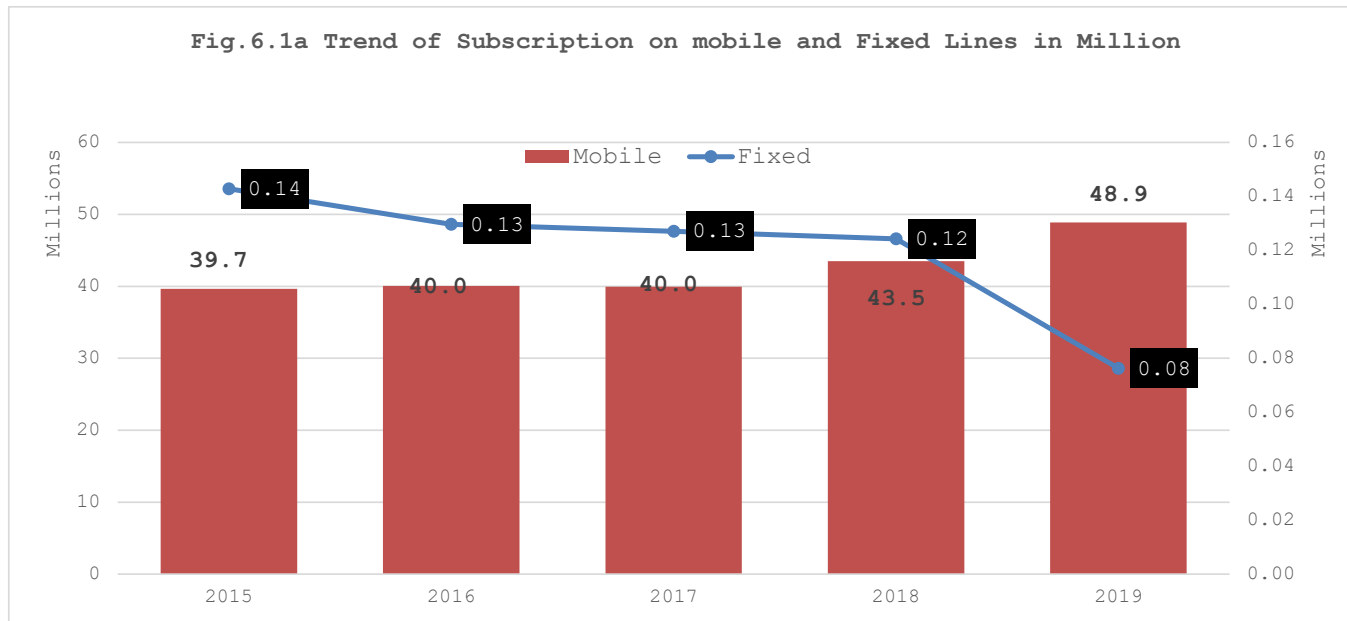
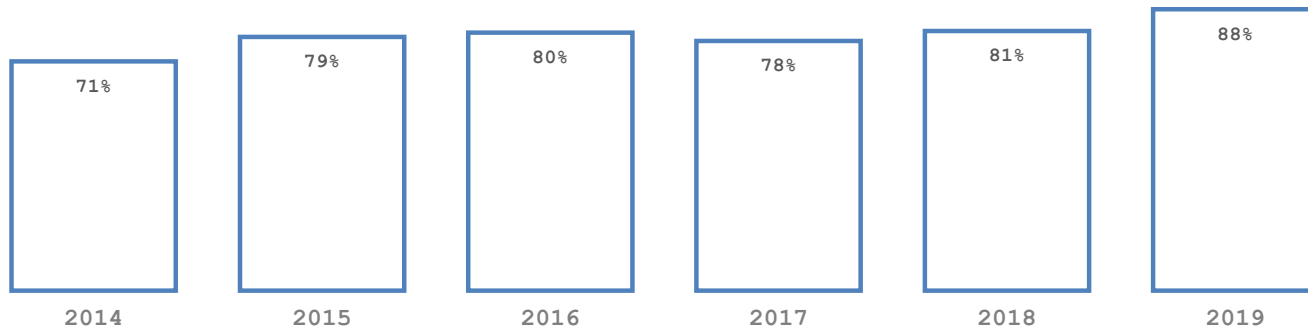


Fig.6.1b Voice Telecom Penetration



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

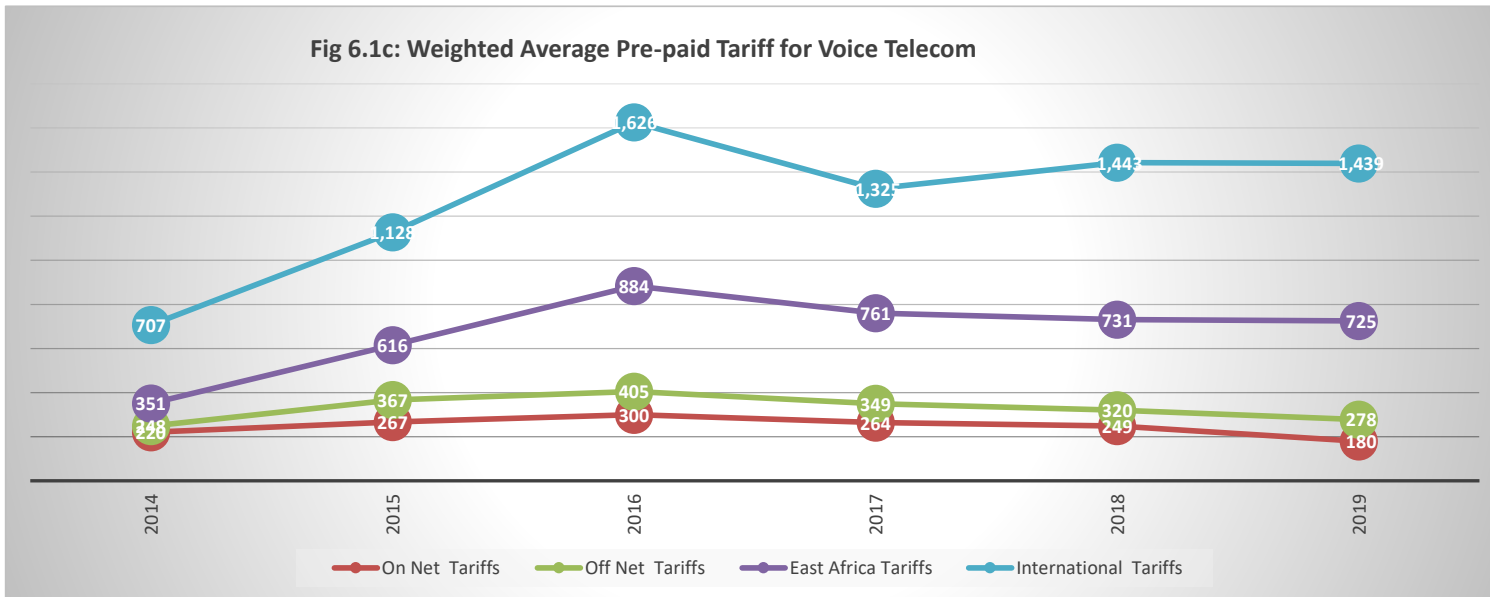
6.1c Traffic (in Minutes - To and From East Africa and International

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

Fig 6.1c: Weighted Average Pre-paid Tariff for Voice Telecom

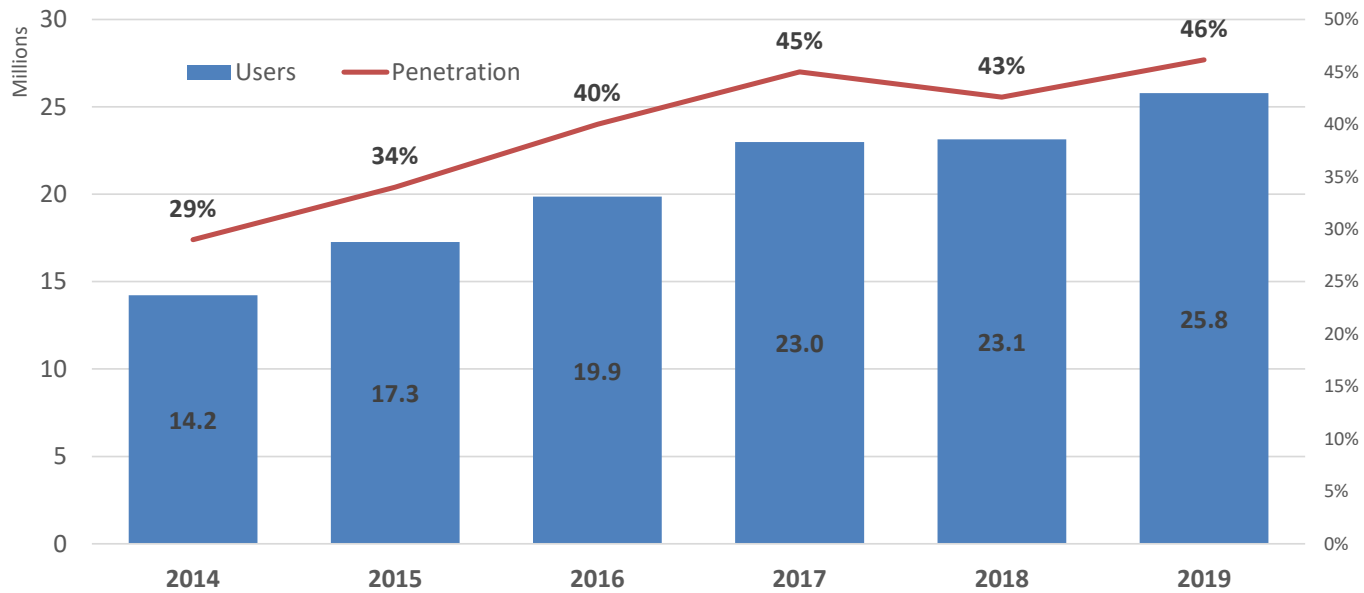


6.2 INTERNET SERVICES

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

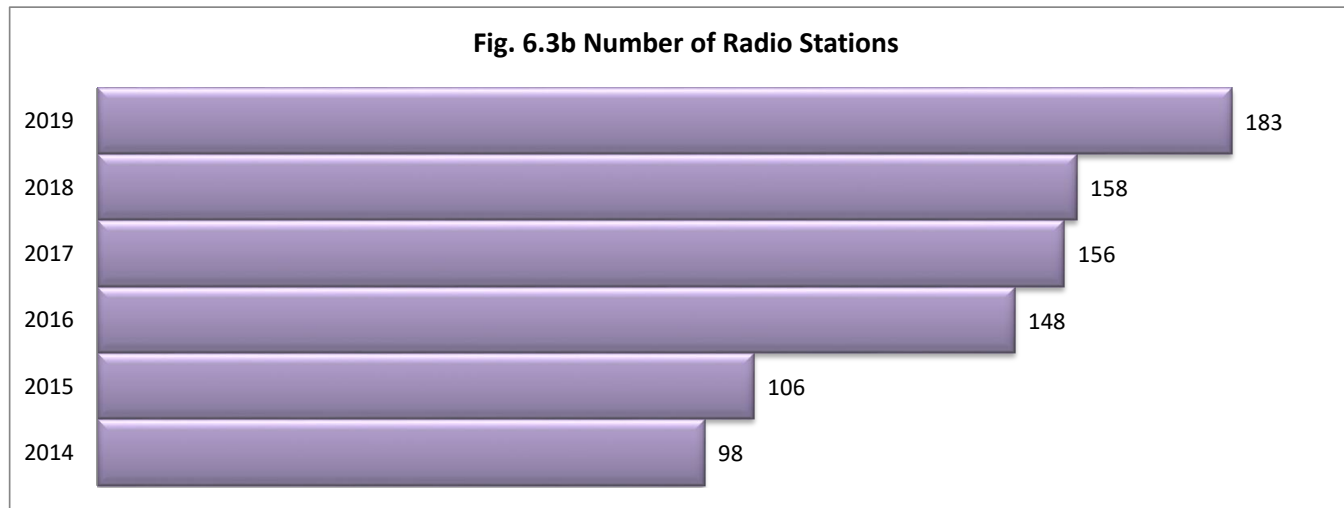


6.3 BROADCASTING SERVICES

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 Decoders

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

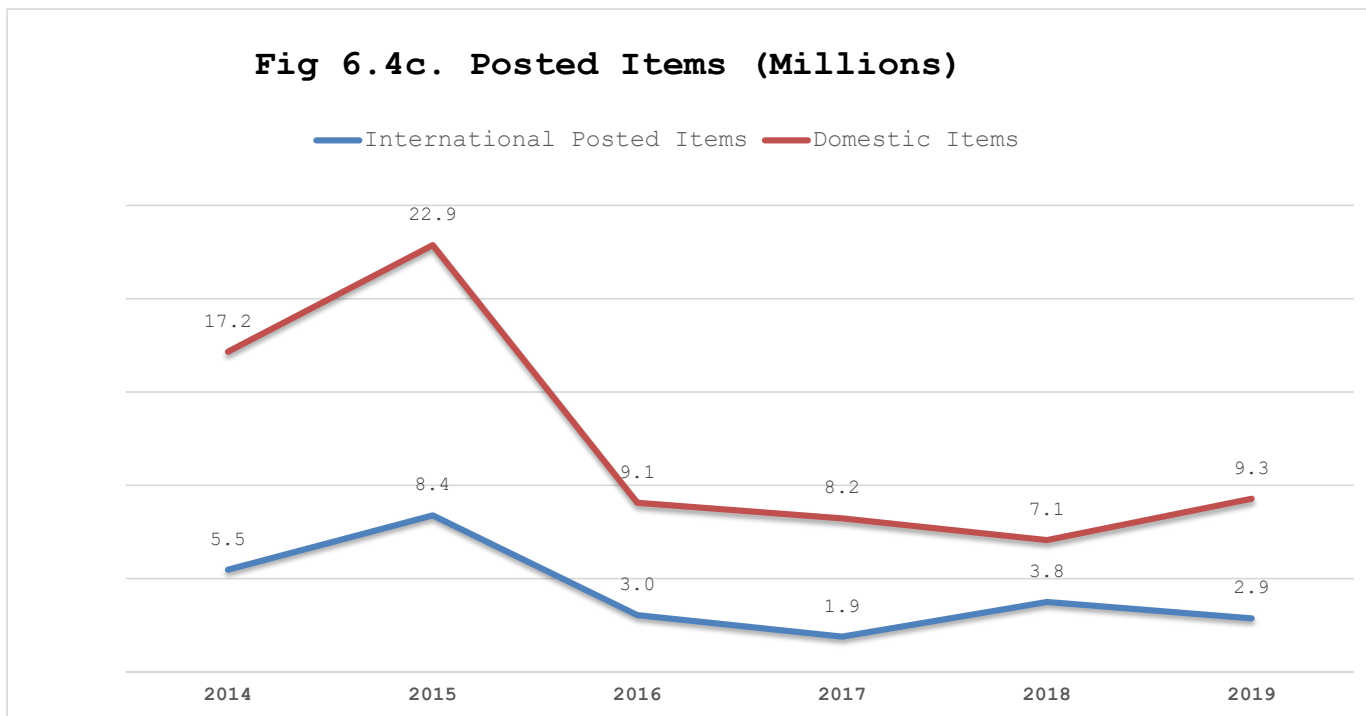
6.4b Public Postal Services Customers

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

