

MOBILE MARKET

1ST QUARTER 2019

TELECOMMUNICATIONS OBSERVATORY

09 May 2019

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The quarterly figures relating to the sales turnover and traffic are published three months after the end of the quarter within the [telecommunications observatory in France](#). Except opposite mention, indicators are in millions of units.

A - Mobiles services market - MtoM SIM cards excluded

I. NATIONAL REPORT - total customers and active customers

	March-18	June-18	Sept-18	Dec-18	Mar-19
Total customers	74,973	74,960	75,503	75,630	75,769
- Quarterly Net Adds	0,370	-0,013	0,543	0,126	0,140
- Year on year net growth (in %)	2,6%	2,0%	1,8%	1,4%	1,1%

Penetration Rate	112,0%	112,0%	112,8%	113,0%	113,0%
<i>Population at January the 1st of previous year (source: Insee)</i>	66,941				67,045

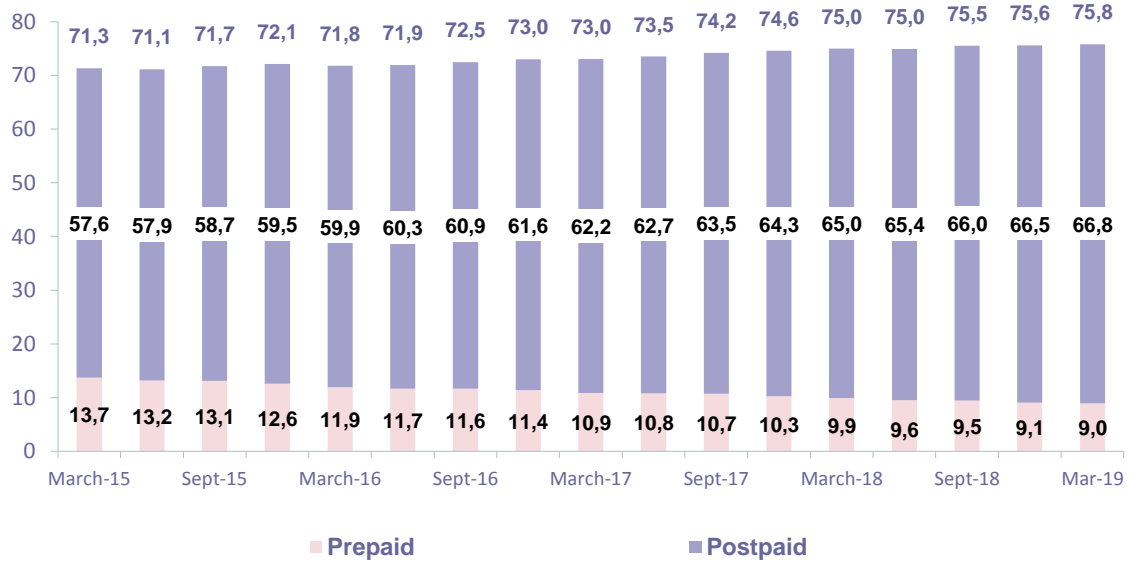
Postpaid customers	65,041	65,404	66,027	66,538	66,816
- Quarterly Net Adds	0,696	0,363	0,622	0,511	0,278
- Year on year net growth (in %)	4,6%	4,3%	4,0%	3,4%	2,7%

Prepaid customers	9,932	9,556	9,475	9,092	8,954
- Quarterly Net Adds	-0,326	-0,376	-0,081	-0,383	-0,138
- Year on year net growth (in %)	-8,7%	-11,7%	-11,6%	-11,4%	-9,9%

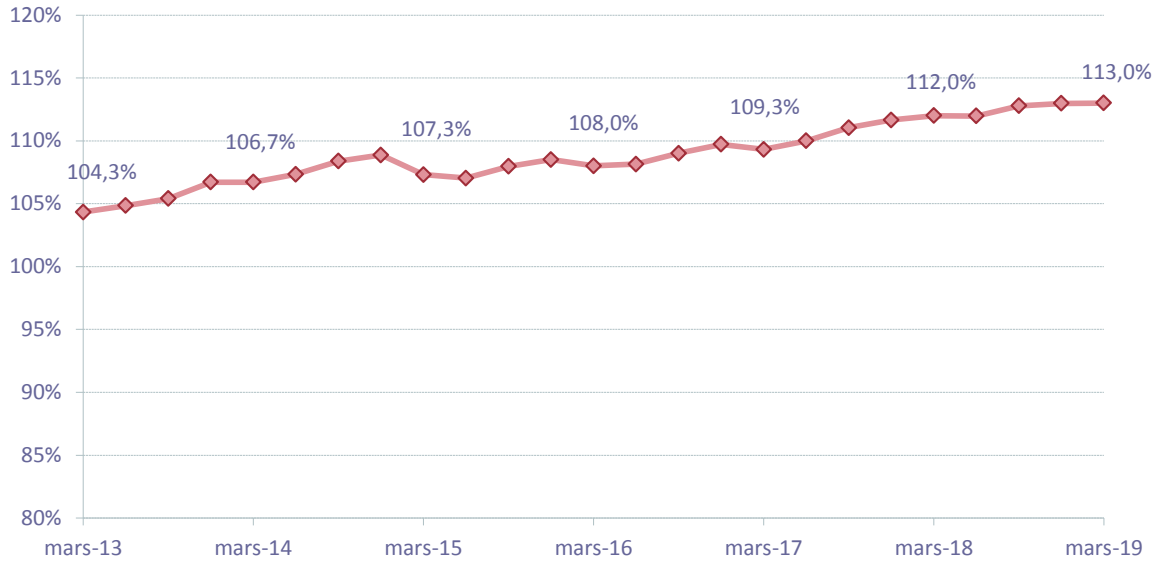
	March-18	June-18	Sept-18	Dec-18	Mar-19
Total active customers	72,589	72,622	73,082	73,484	73,577
- as a % of total customers	96,8%	96,9%	96,8%	97,2%	97,1%
- Quarterly Net Adds	0,520	0,033	0,460	0,402	0,093
- Year on year net growth (in %)	2,9%	2,4%	1,9%	2,0%	1,4%
Adjusted figure					

Number of national SIM cards (MtoM cards excluded)

in millions



Mobile penetration rate in France



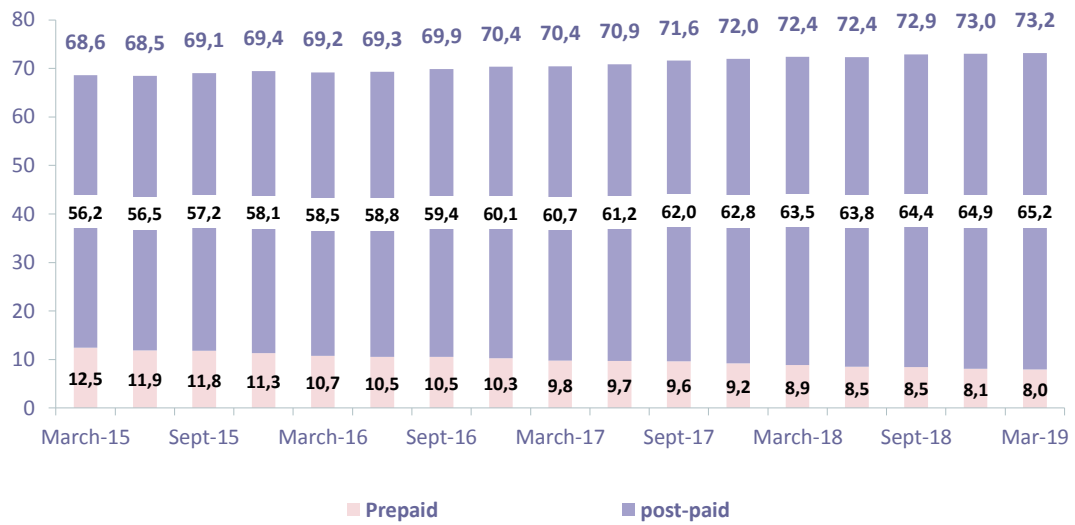
II. METROPOLITAN REPORT

II.1 Total customers segmentation and total active customers (excluding MtoM SIM cards)

	March-18	June-18	Sept-18	Dec-18	Mar-19
Total customers	72,372	72,367	72,912	73,022	73,152
among which Internet SIM cards	3,465	3,459	3,432	3,369	3,289
- Quarterly Net Adds	0,368	-0,004	0,545	0,110	0,130
- Year on year net growth (in %)	2,8%	2,1%	1,8%	1,4%	1,1%
Penetration Rate	111,8%	111,8%	112,6%	112,8%	112,9%
<i>Population at January the 1st of previous year (source: Insee)</i>	64,725				64,812
Postpaid customers	63,476	63,828	64,435	64,923	65,182
among which Internet SIM cards	2,838	2,855	2,879	2,875	2,850
- Quarterly gross sales	3,953	3,384	3,683	3,442	2,988
- Quarterly Net Adds	0,679	0,352	0,607	0,488	0,259
- Year on year net growth (in %)	4,6%	4,3%	4,0%	3,4%	2,7%
Prepaid customers	8,896	8,539	8,475	8,099	7,970
among which Internet SIM cards	0,628	0,604	0,553	0,495	0,439
- Quarterly gross sales	1,958	1,964	2,147	2,010	1,754
- Quarterly Net Adds	-0,311	-0,357	-0,064	-0,376	-0,129
- Year on year net growth (in %)	-8,9%	-12,1%	-12,1%	-12,0%	-10,4%
Total active customers	70,230	70,282	70,755	71,142	71,230
- as a % of total customers	97,0%	97,1%	97,0%	97,4%	97,4%
- Quarterly Net Adds	0,519	0,052	0,473	0,387	0,088
- Year on year net growth (in %)	3,0%	2,5%	2,0%	2,1%	1,4%
Adjusted figure					

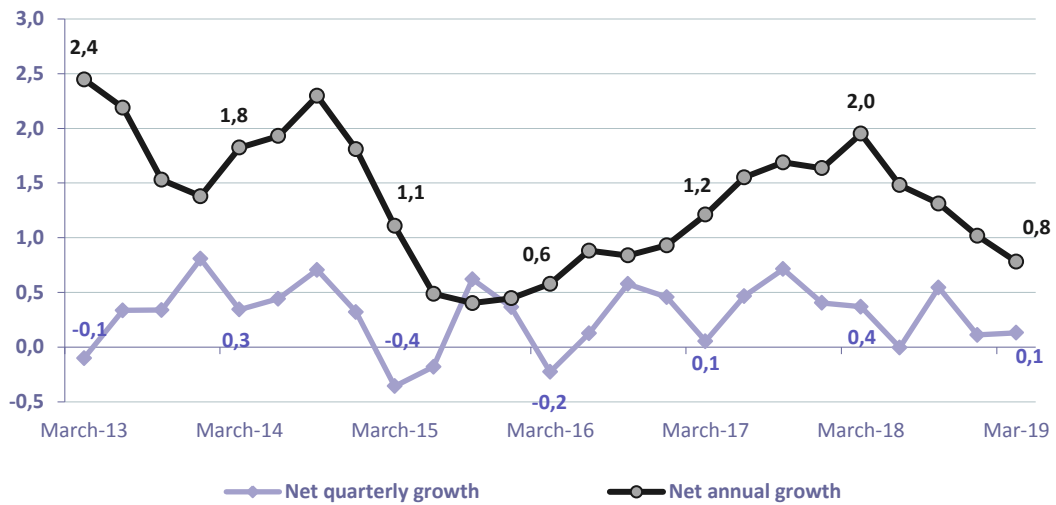
Number of metropolitan SIM cards

in millions



Net quarterly and annual growths of the total metropolitan customers (MtoM cards excluded)

in millions



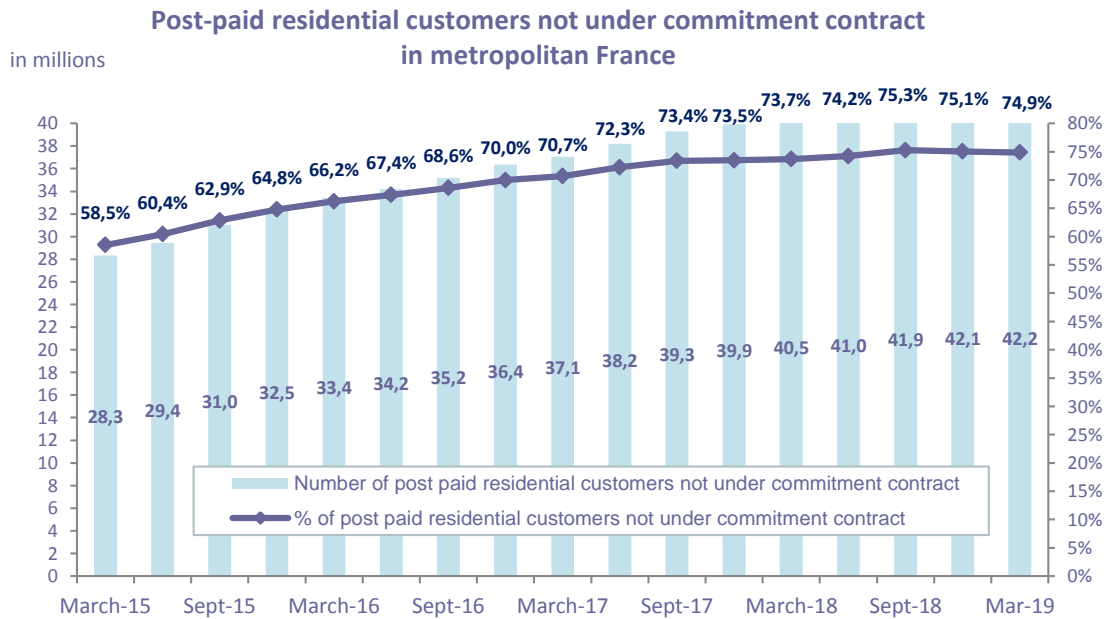
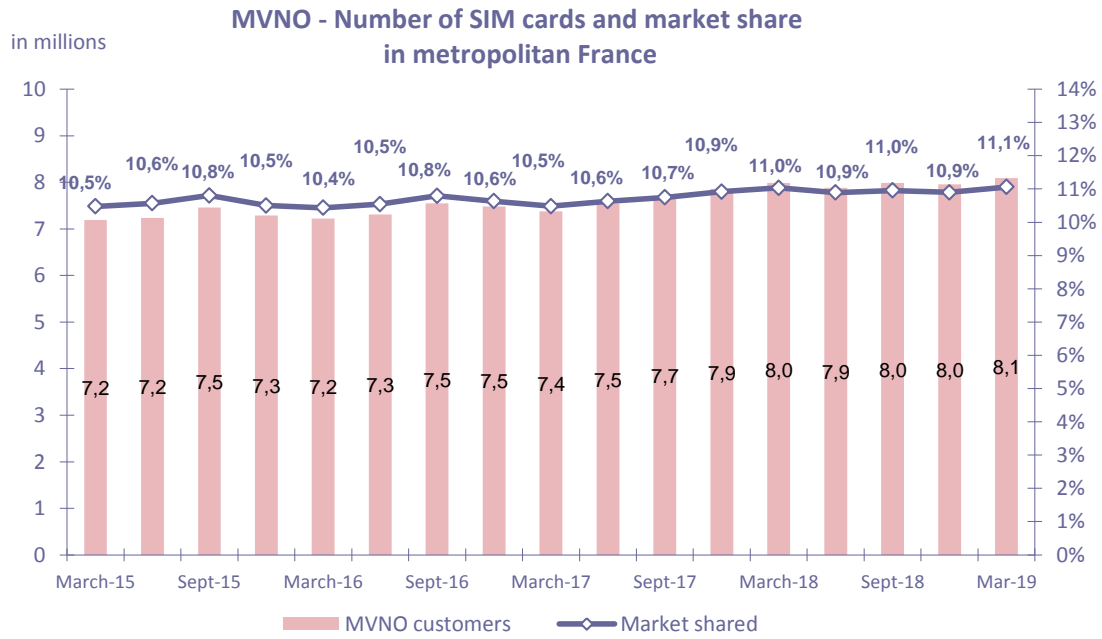
II.2 Virtual mobile network operators (MVNO) market share



	March-18	June-18	Sept-18	Dec-18	Mar-19
Mobile networks operators (MNOs) customers	64,388	64,484	64,926	65,063	65,063
- Among which postpaid customers	59,661	59,951	60,521	60,886	61,083
- Quarterly Net Adds	0,245	0,096	0,442	0,137	0,000
- Year on year net growth (in %)	2,1%	1,8%	1,6%	1,4%	1,0%
MVNOs customers	7,984	7,884	7,987	7,959	8,090
	3,814	3,877	3,914	4,037	4,099
- Quarterly Net Adds	0,123	-0,100	0,103	-0,027	0,130
- Year on year net growth (in %)	8,2%	4,6%	3,8%	1,3%	1,3%
MVNO Market share	11,0%	10,9%	11,0%	10,9%	11,1%
MVNO Market share of gross postpaid sales	8,4%	8,2%	7,4%	10,7%	9,6%
MVNO Market share of gross prepaid sales	64,2%	64,4%	62,3%	65,7%	63,0%

II.3 Market fluidity

	March-18	June-18	Sept-18	Dec-18	Mar-19
Quarterly postpaid cancellation rate	5,2%	4,8%	4,8%	4,6%	4,2%
Quarterly prepaid cancellation rate	25,0%	26,5%	26,0%	28,8%	23,4%
Numbers ported during the quarter	2,137	2,065	2,108	1,805	1,614
- Year on year net growth (in %)	36,8%	14,8%	19,4%	-26,4%	-24,5%
Post-paid residential customers not under commitment	40,473	40,964	41,941	42,126	42,168
- % of customers not under commitment contract	73,7%	74,2%	75,3%	75,1%	74,9%
Post-paid customers not under commitment contract	43,765	44,429	45,480	45,837	45,722
- % of customers not under commitment contract	68,9%	69,6%	70,6%	70,6%	70,1%
Adjusted figure					



III. METROPOLITAN RESIDENTIAL AND BUSINESS MARKET



III.1 Residential market - Total customers segmentation

	March-18	June-18	Sept-18	Dec-18	Mar-19
Total residential customers	63,811	63,729	64,193	64,218	64,299
- Quarterly Net Adds	2,223	2,205	2,177	2,101	2,014
- Quarterly Net Adds	0,296	-0,082	0,465	0,025	0,081
- Year on year net growth (in %)	2,6%	1,8%	1,6%	1,1%	0,8%

Postpaid residential customers	54,915	55,189	55,719	56,119	56,329
- Quarterly gross sales	3,557	3,026	3,341	3,047	2,539
- Quarterly Net Adds	0,606	0,274	0,529	0,401	0,210
- Year on year net growth (in %)	4,8%	4,4%	4,0%	3,3%	2,6%

Prepaid residential customers	8,896	8,539	8,475	8,099	7,970
- Quarterly gross sales	1,958	1,964	2,147	2,010	1,754
- Quarterly Net Adds	-0,311	-0,357	-0,064	-0,376	-0,129
- Year on year net growth (in %)	-8,9%	-12,1%	-12,1%	-12,0%	-10,4%

III.2 Residential market - Mobile Virtual Network Operators market share

	March-18	June-18	Sept-18	Dec-18	Mar-19
MNOs	56,225	56,260	56,634	56,689	56,655
- Quarterly Net Adds	0,188	0,035	0,375	0,055	-0,034
- Year on year net growth (in %)	2,0%	1,6%	1,4%	1,2%	0,8%

MVNOs	7,586	7,469	7,559	7,529	7,644
- Quarterly Net Adds	0,108	-0,117	0,090	-0,030	0,115
- Year on year net growth (in %)	7,6%	3,8%	3,1%	0,7%	0,8%

MVNO Market share	11,9%	11,7%	11,8%	11,7%	11,9%
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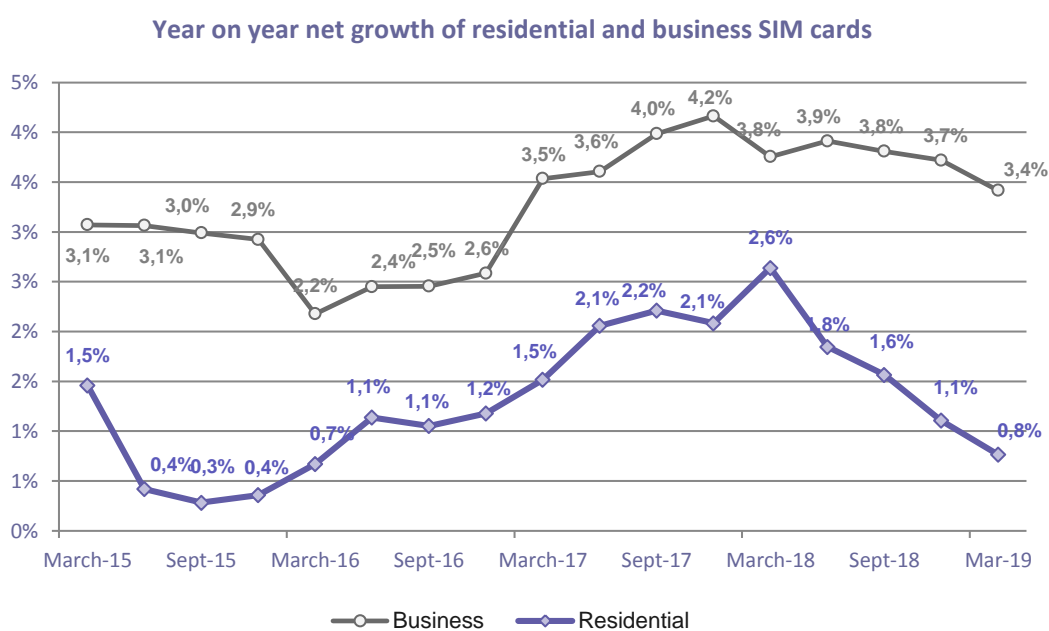
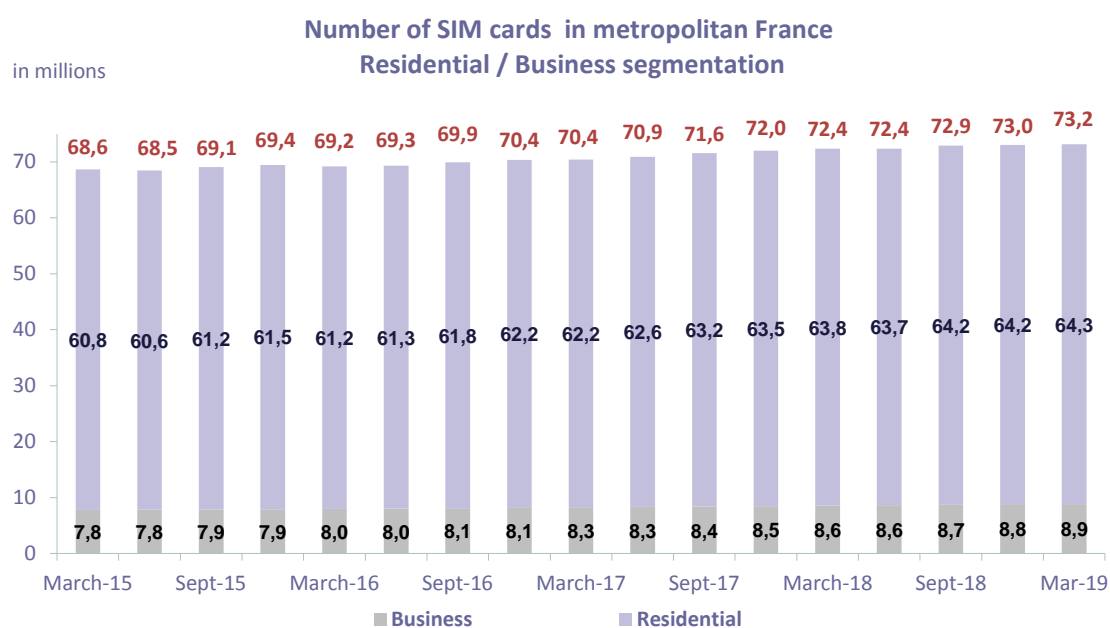
MVNO Market share of gross postpaid sales	8,8%	8,7%	7,9%	11,6%	9,9%
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Adjusted figure

III.3 Business market - total customers MtoM SIM cards excluded

March-18	June-18	Sept-18	Dec-18	Mar-19
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Postpaid business customers	8,561	8,639	8,717	8,804	8,853
among which Internet SIM cards	1,242	1,254	1,255	1,268	1,275
- Quarterly Net Adds	0,072	0,078	0,078	0,087	0,049
- Year on year net growth (in %)	3,8%	3,9%	3,8%	3,7%	3,4%
Adjusted figure					



IV. OVERSEAS REPORT : DOM, Saint-Martin, Saint-Barthélemy, Saint-Pierre-et-Miquelon

IV.1 Overseas departments: total customers and total active customers segmentation

	March-18	June-18	Sept-18	Dec-18	Mar-19
Total customers	2,602	2,593	2,591	2,607	2,617
- Quarterly Net Adds	0,002	-0,009	-0,002	0,016	0,010
- Year on year net growth (in %)	-0,6%	-0,8%	-0,4%	0,3%	0,6%

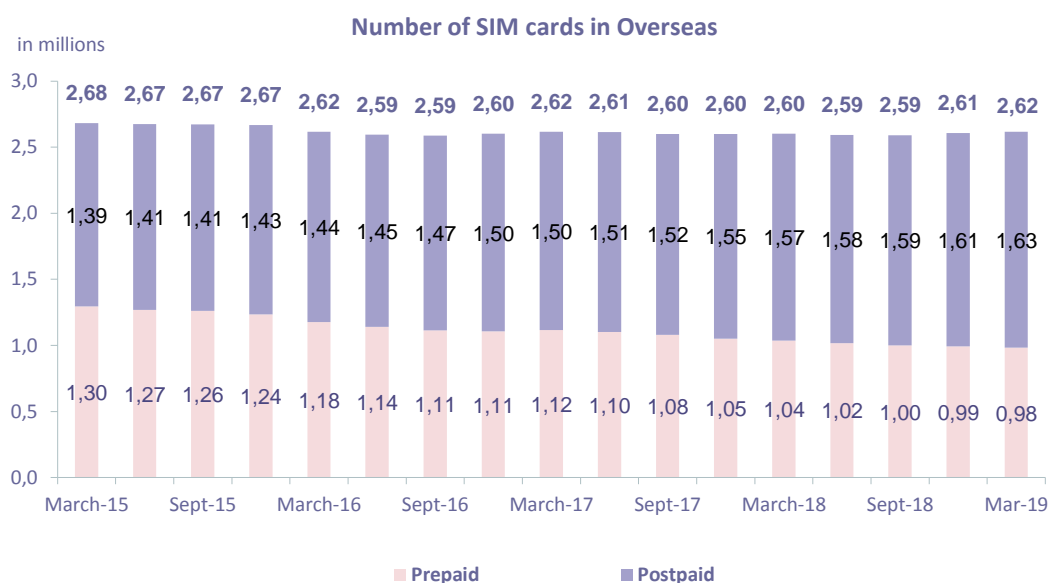
Penetration Rate	117,4%	117,0%	116,9%	117,7%	117,2%
<i>Population at January the 1st of previous year (source: Insee)</i>	2,216				2,233

Postpaid customers	1,565	1,576	1,591	1,614	1,633
- Quarterly Net Adds	0,017	0,011	0,015	0,023	0,019
- Year on year net growth (in %)	4,2%	4,1%	4,6%	4,3%	4,3%

Prepaid customers	1,037	1,017	1,000	0,993	0,984
- Quarterly Net Adds	-0,015	-0,020	-0,017	-0,007	-0,009
- Year on year net growth (in %)	-7,0%	-7,7%	-7,3%	-5,6%	-5,1%

Total active customers	2,359	2,340	2,327	2,342	2,347
- as a % of total customers	90,7%	90,2%	89,8%	89,8%	89,7%
- Quarterly Net Adds	0,001	-0,019	-0,013	0,015	0,005
- Year on year net growth (in %)	0,2%	-0,3%	0,3%	-0,7%	-0,5%

Adjusted figure



IV.2 Guadeloupe, St-Martin, St-Barth. total customers and active customers segm.



	March-18	June-18	Sept-18	Dec-18	Mar-19
Total customers	0,630	0,622	0,619	0,618	0,626
- Quarterly Net Adds	0,005	-0,009	-0,002	-0,001	0,007
- Year on year net growth (in %)	-1,6%	-1,8%	-2,0%	-1,2%	-0,8%
Penetration Rate	146,2%	144,1%	143,6%	143,3%	145,8%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,431				0,429
Postpaid customers	0,352	0,354	0,355	0,359	0,363
- Quarterly Net Adds	0,004	0,002	0,001	0,004	0,004
- Year on year net growth (in %)	3,4%	3,3%	3,1%	2,9%	2,9%
Prepaid customers	0,278	0,267	0,264	0,259	0,263
- Quarterly Net Adds	0,001	-0,011	-0,003	-0,005	0,004
- Year on year net growth (in %)	-7,3%	-7,9%	-8,2%	-6,3%	-5,5%
Total active customers	0,558	0,547	0,535	0,537	0,539
- as a % of total customers	88,4%	88,0%	86,4%	86,9%	86,2%
- Quarterly Net Adds	-0,001	-0,011	-0,012	0,002	0,002
- Year on year net growth (in %)	-2,9%	-3,7%	-4,0%	-3,9%	-3,3%

IV.3 Guyane: total customers and total active customers segmentation



	March-18	June-18	Sept-18	Dec-18	Mar-19
Total customers	0,294	0,297	0,295	0,297	0,301
- Quarterly Net Adds	-0,002	0,004	-0,002	0,002	0,004
- Year on year net growth (in %)	-1,2%	-0,8%	-1,2%	0,5%	2,6%
Penetration Rate	102,1%	103,4%	102,6%	103,4%	101,5%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,288				0,297
Postpaid customers	0,124	0,125	0,125	0,128	0,130
- Quarterly Net Adds	0,001	0,001	0,000	0,003	0,002
- Year on year net growth (in %)	3,9%	4,8%	4,6%	4,9%	5,3%
Prepaid customers	0,170	0,172	0,170	0,169	0,171
- Quarterly Net Adds	-0,003	0,002	-0,003	-0,001	0,002
- Year on year net growth (in %)	-4,6%	-4,5%	-5,1%	-2,7%	0,6%
Total active customers	0,259	0,260	0,258	0,261	0,260
- as a % of total customers	88,4%	87,6%	87,5%	87,7%	86,3%
- Quarterly Net Adds	-0,001	0,001	-0,002	0,003	-0,001
- Year on year net growth (in %)	-0,5%	-0,5%	-1,6%	0,2%	0,2%

IV.4 Martinique: total customers and total active customers segmentation



	March-18	June-18	Sept-18	Dec-18	Mar-19
Total customers	0,527	0,527	0,527	0,530	0,531
- Quarterly Net Adds	0,002	0,000	0,000	0,003	0,002
- Year on year net growth (in %)	-2,3%	-1,2%	-0,4%	0,9%	0,8%
Penetration Rate	142,9%	143,0%	142,9%	143,7%	145,8%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,369				0,364
Postpaid customers	0,324	0,326	0,326	0,329	0,332
- Quarterly Net Adds	0,002	0,001	0,000	0,003	0,004
- Year on year net growth (in %)	2,4%	2,4%	2,0%	2,0%	2,5%
Prepaid customers	0,203	0,201	0,201	0,201	0,199
- Quarterly Net Adds	0,000	-0,001	0,000	0,000	-0,002
- Year on year net growth (in %)	-9,0%	-6,5%	-4,2%	-0,8%	-1,7%
Total active customers	0,459	0,453	0,445	0,445	0,448
- as a % of total customers	87,1%	85,9%	84,5%	84,1%	84,4%
- Quarterly Net Adds	-0,001	-0,006	-0,008	0,000	0,003
- Year on year net growth (in %)	-1,1%	-1,7%	-2,8%	-3,3%	-2,3%

IV.5 Mayotte: total customers and total active customers segmentation



	March-18	June-18	Sept-18	Dec-18	Mar-19
Total customers	0,280	0,281	0,283	0,292	0,287
- Quarterly Net Adds	-0,002	0,001	0,002	0,009	-0,005
- Year on year net growth (in %)	4,6%	1,4%	2,2%	3,6%	2,5%
Penetration Rate	107,4%	107,8%	108,6%	112,0%	106,0%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,260				0,270
Postpaid customers	0,066	0,065	0,065	0,066	0,066
- Quarterly Net Adds	0,001	0,000	0,000	0,000	0,000
- Year on year net growth (in %)	1,7%	0,1%	-0,8%	0,8%	-0,1%
Prepaid customers	0,214	0,215	0,218	0,226	0,221
- Quarterly Net Adds	-0,002	0,001	0,002	0,008	-0,005
- Year on year net growth (in %)	5,6%	1,7%	3,1%	4,5%	3,3%
Total active customers	0,241	0,242	0,247	0,252	0,250
- as a % of total customers	86,4%	86,1%	87,4%	86,4%	87,2%
- Quarterly Net Adds	0,006	0,000	0,005	0,005	-0,002
- Year on year net growth (in %)	6,9%	5,3%	10,5%	6,9%	3,4%
Adjusted figure					

IV. 6 Réunion: total customers and total active customers segmentation



	March-18	June-18	Sept-18	Dec-18	Mar-19
Total customers	0,866	0,861	0,862	0,866	0,867
- Quarterly Net Adds	-0,001	-0,005	0,001	0,004	0,001
- Year on year net growth (in %)	-0,4%	-0,6%	0,4%	-0,2%	0,1%
Penetration Rate	100,5%	99,9%	100,0%	100,4%	100,1%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,862				0,867
Postpaid customers	0,695	0,701	0,715	0,728	0,738
- Quarterly Net Adds	0,010	0,007	0,014	0,013	0,010
- Year on year net growth (in %)	5,4%	5,7%	7,0%	6,3%	6,2%
Prepaid customers	0,172	0,160	0,147	0,138	0,130
- Quarterly Net Adds	-0,011	-0,011	-0,013	-0,009	-0,008
- Year on year net growth (in %)	-18,4%	-21,0%	-22,9%	-24,5%	-24,6%
Total active customers	0,837	0,833	0,837	0,841	0,845
- as a % of total customers	96,6%	96,7%	97,1%	97,2%	97,4%
- Quarterly Net Adds	-0,001	-0,003	0,004	0,005	0,003
- Year on year net growth (in %)	1,2%	1,3%	2,7%	0,5%	1,0%
Adjusted figure					

B - Internet of things : MtoM SIM cards

I. MtoM CARDS OF FRENCH OPERATORS

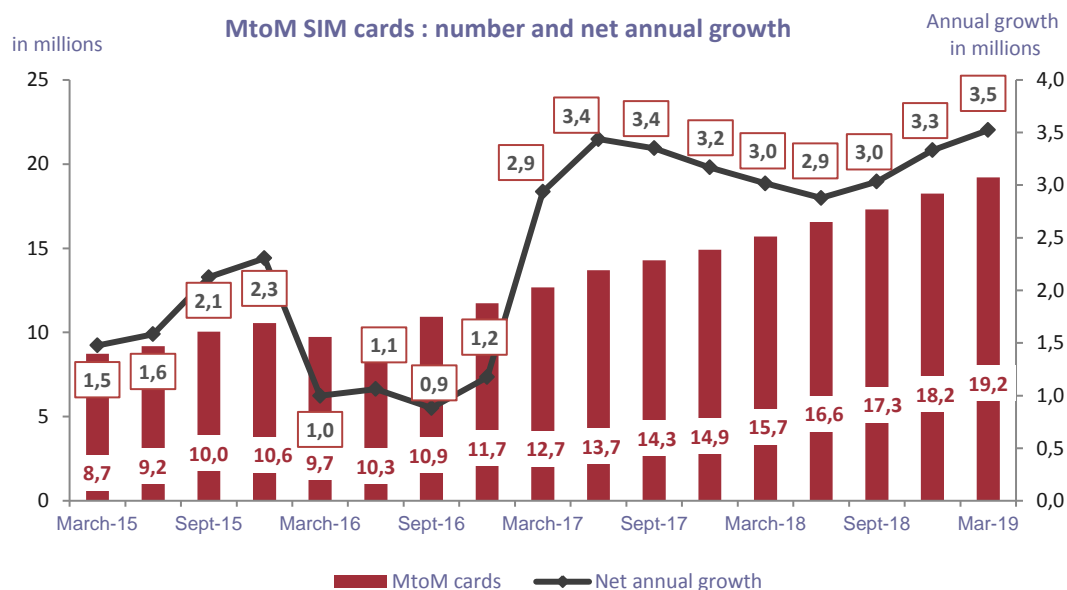
	March-18	June-18	Sept-18	Dec-18	Mar-19
MtoM SIM cards	15,691	16,568	17,312	18,238	19,214
-Gross sales for the quarter	0,918	1,012	0,899	1,086	1,072
- Quarterly Net Adds	0,786	0,877	0,744	0,926	0,977
- Year on year net growth (in %)	23,8%	21,0%	21,2%	22,4%	22,5%

I.1 MtoM CARDS OF FRENCH OPERATORS - METROPOLITAN

	March-18	June-18	Sept-18	Dec-18	Mar-19
MtoM SIM cards	15,659	16,535	17,279	18,203	19,179
- Quarterly Net Adds	0,786	0,876	0,743	0,924	0,976
- Year on year net growth (in %)	23,9%	21,1%	21,3%	22,4%	22,5%

I.2 MtoM CARDS OF FRENCH OPERATORS - OVERSEAS DEPARTMENTS

	March-18	June-18	Sept-18	Dec-18	Mar-19
MtoM SIM cards	0,032	0,033	0,033	0,035	0,035
- Quarterly Net Adds	0,000	0,001	0,000	0,001	0,001
- Year on year net growth (in %)	1,0%	3,3%	3,5%	6,7%	9,8%
Adjusted figure					



Appendix: DEFINITIONS

Total SIM cards: Total SIM cards registered with an operator's Home Location Register (HLR) or in the Home Subscriber Server (HSS) at the date in question. So, for business clients, each line is considered as a post-paid contract. Post-paid cards are those whose service is invoiced regularly (packages, metered offers, blocked accounts, etc.). By default, any non-post-paying client is considered to be a pre-paying client.

Internet SIM cards: number of SIM cards sold by mobile operators (flat rates or prepaid cards), to be used solely for accessing the Internet (PCMCIA cards, 3G/4G USB keys). These cards cannot be used to make voice calls.

Gross sales: total SIM cards at the end of the quarter which are registered with the HLR/HSS during the quarter. They exclude migrations: pre-paid to post-paid migration corresponds to clients asking their operator to replace their pre-paid offer in force at the beginning of the quarter with a post-paid offer; conversely, post-paid to pre-paid migration corresponds to clients asking their operator to replace their post-paid offer in force at the beginning of the quarter with a pre-paid offer.

Cancellation: Total SIM cards at the beginning of the quarter whose registration in the HLR/HSS was deleted during the quarter. Modifications to the registration in the HLR/HSS are not cancellations. So, this definition does not cover changes in offers within a line, or pre- to post-paid migrations or post- to pre-paid migrations, or service suspensions.

Penetration rate: Penetration rate: it is obtained by dividing the total number of clients by the population. The reference population is 1st January of the year N-1 published by Insee on the 1st January of the year N. The reference population in 2019, comes from estimates published in January 2019 (and therefore of the population for January 1st, 2018).

Customers not under commitment contract: a client under a commitment contract is any client having taken out or renewed a contract (out of all or part of the contracts related to mobile service) for a minimum period not having expired at the date in question. A client not under commitment contract is any client not having a contract.

Total active customers: the number of active clients equals to all post-paid customers under contract and pre-paid customers under contract having made or received a telephone call, whether free or paid, sent a SMS, MMS used a multimedia (e-mail, internet) service during the past three months (not including incoming SMS).

Number of ported numbers : is calculated as half of the volume of numbers of "in" porting and "out" porting done by all operators. "In" porting is considered to be an effective porting from the receiving operator's point of view. "Out" porting is an effective porting from the donor operator's point of view.

Total MtoM cards: number of SIM cards used for communication between remote equipment (remote management of equipment, terminals and servers, fixed or mobile). The communications from these cards are generally carried out without human intervention. These cards are used for example for tracking of objects and tools (fleets of vehicles, machinery, etc.), for purposes of updating of data (surveys at distance of meters, sensors...), for the identification and monitoring of all kinds (alarms, remote actions...), the list of those uses where communication is from "machine to machine" is not limited. Are taken into account the MtoM SIM cards, the communication was done only in downstream, only upstream or both. The cards used for interpersonal communication and exclusive internet cards are not included here.

Operators

- Metropolitan mobile network operators: Bouygues Telecom, Free mobile, Orange, Société Française du Radiotéléphone (SFR).
- Overseas mobile network operators : Dauphin Telecom, Digicel AFG, Globaltel, Orange Caraïbes, Orange Réunion, Outremer Telecom, SAS SPM, Société Réunionnaise du Radiotéléphone (SRR), Telco OI, UTS Caraïbe.
- Mobile Virtual Network Operators independent of mobile network operators active on the quarter.