CRAN

Communications Regulatory Authority of Namibia

QUARTERLY STATISTICS NEWSLETTER

Q1 OF 2023

Information obtained from Telecommunications and Broadcasting Service Licensees (as per their licence conditions) is utilised to compile this report for the period 01 January to 31 March 2023

EXECUTIVE SUMMARY			
SUBSCRIBERS	**TRAFFIC**	**BROADCASTERS**	**POSTAL**
The Mobile Telecommunication sector experienced a contraction in the number of subscribers. Fixed-line subscriptions remained stable.	The aggregate traffic experienced a decline ranging between 1% and 8%.	The broadcasting sector experienced a 6% decline in revenue.	The utilization of post-boxes witnessed a remarkable surge, registering a substantial 55% increase in postal activity.

TABLE OF CONTENT

1. Mobile Subscribers

The mobile telecommunications sector experienced a contraction in the number of subscribers during the first quarter of 2023. This contraction ranged between 4% and 8%, indicating a decrease in the total count of individuals or entities actively utilising mobile services. This could be due to the SIM card registration process. This is because the implementation of SIM registration carries the potential for a trade-off in terms of the subscriber's level of utilisation of their SIM cards.

Table 1: Mobile subscriber numbers in 1000s		**2021 Q4**	**2022 Q1**	**2022 Q2**	**2022 Q3**	**2022 Q4**	**2023 Q1**	**% change**
Active SIM cards ('000)	Prepaid	2,716	2,705	2,694	2,701	2,706	2,565	-5%
	Postpaid	199	205	204	205	200	202	1%
	Total	2,915	2,910	2,898	2,906	2,906	2,766	-5%
Mobile Broadband ('000)	Mobile Phone	1,894	1,887	1,905	1,925	1,965	1,802	-8%
	Dongle / Routers	28	24	19	23	22	22	-0%
	Total	1,922	1,911	1,923	1,948	1,987	1,825	-8%
% of SIM using Internet		65%	65%	66%	66%	68%	65%	-4%

2. Fixed-line Subscribers

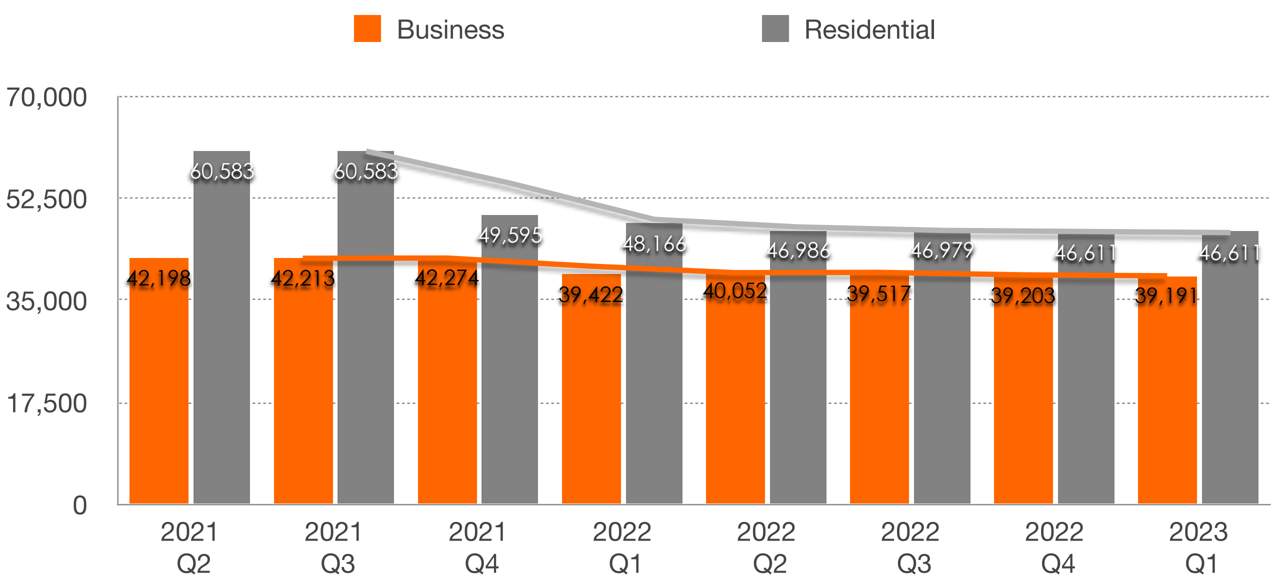


Figure 1: Fixed-line Subscribers

Fixed-line subscriptions remained stable without significant fluctuation during the first quarter of 2023.

3. Other Subscribers

Fixed internet subscriptions continue to rise, particularly in terms of higher internet speeds.

Fibre connection is gaining momentum. The expansion of the fibre network infrastructure is likely driving this trend. However, a downward trend is observed in the usage of MetroNet & Leased lines during the quarter under review.

Table 2: Other subscribers		2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	% change
ADSL	10 Mbps and above	6,010	61,11	6,464	6,947	7,322	7,739	6%
	2 to 10 Mbps	65,095	61,186	61,580	62,328	62,885	63,226	1%
	below 2Mbps	1,231	696	625	596	582	554	-5%
	Total	72,336	61,882	68,669	69,871	70,789	71,519	1%
Fibre to the home		7,052	8,330	9,445	9,968	11,073	13,979	26%
MetroNet (ethernet)		214	227	157	147	147	139	-5%
Leased lines		2,953	2,597	2,354	2,207	2,082	1,775	-15%
Other wireless		5,930	6,960	9,512	9,940	10,950	12,403	13%
Satellite / VSAT		692	787	1,177	1,333	1,308	1,362	4%
VoIP		3,269	3,342	3,310	3,395	3,395	4,866	43%

4. Traffic

The overall traffic experienced a contraction during the first quarter of 2023. This contraction ranged between 1% and 8%, indicating a decrease in the total volume of traffic observed within the specified period. This is due to more people utilsing data services and OTTs to communicate.

Table 3: Traffic		2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	% change
Mobile outgoing ('000)	On net minutes	2,103,327	1,985,466	2,002,409	2,153,453	2,167,596	2,041,460	-6%
	Off-net mobile minutes	55,741	60,287	62,874	68,701	71,771	78,055	9%
	Off-net fixed-line minutes	20,072	19,837	18,711	19,480	19,826	19,038	-4%
	International minutes	3,285	2,586	2,595	2,619	2,867	2,634	-8%
	SMS send	2,350,057	2,311,307	2,289,619	2,314,126	2,348,651	2,165,430	-8%
Mobile Data use in GB ('000)		20,227	19,753	20,816	20,958	21,872	21,609	-1%
Fixed line Outgoing minutes ('000)		24,725	24,290	22,536	24,035	22,701	22,465	-1%

5. Telecommunication Revenue

In line with the decline observed in traffic during the first quarter of 2023, the revenue generated from data, voice and SMS services experienced a slight contraction.

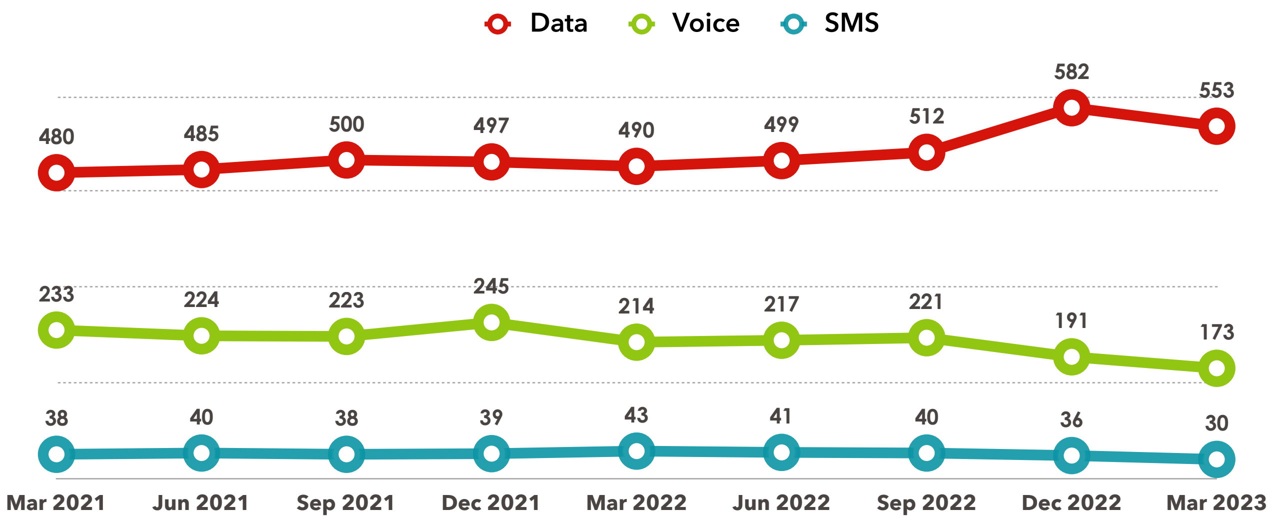


Figure 2: Data, Voice & SMS Revenue in million

6. Telecommunication Investment

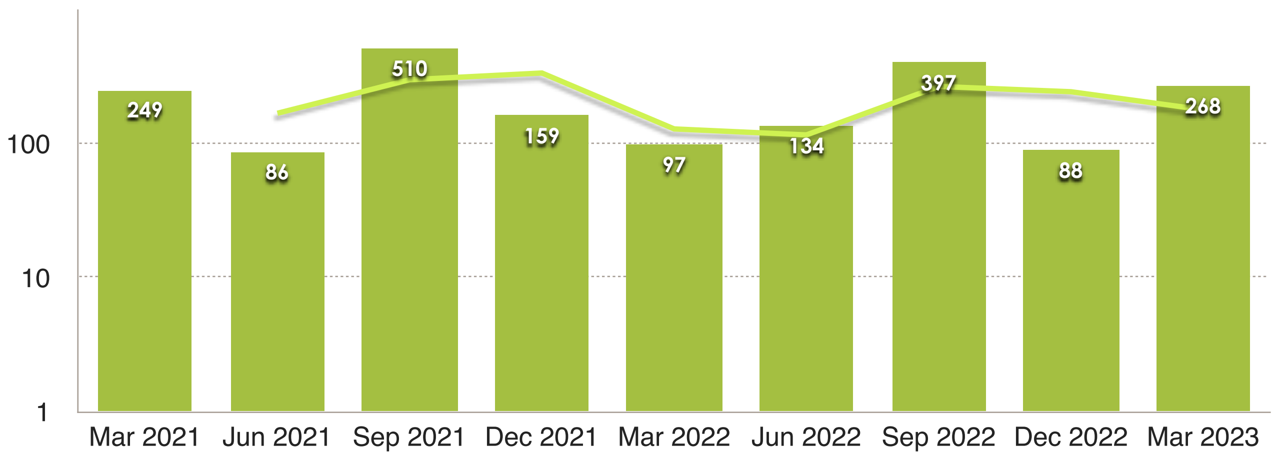


Figure 3: Telecommunication Investment in millions

The telecommunications sector's total investment displays inherent volatility, characterised by fluctuations observed over time. This is due to the fact that investment in the telecommunications sector is not static, it is influenced by the economic factors and the industry's dynamics that determine how capital is allocated in the sector.

7. Population Coverage

During 2023, Namibia has observed a 6% increase in population coverage for 4G services. Despite this positive trend, the Kunene region exhibited the lowest coverage at 41%, followed by the Omaheke region at 57% and the Kavango West region at 59%, indicating that these areas remain the least covered in terms of 4G services.

This growth can be mainly attributed to the substantial investments in infrastructure made by operators in recent years. One notable example is the implementation of MTC's 081-everyone project, which started in 2019.

Population Coverage 2023

		Population 3G Coverage			Population 4G Coverage			Broadband Population Coverage 3G+4G	People not covered		
		All	MTC	TN	All	MTC	TN		3G	4G	Broadband
	Namibia	88%	88%	70%	85%	85%	54%	90%	294,733	373,524	251,383
1	Kunene	51%	51%	34%	41%	41%	20%	52%	53,461	64,320	51,929
2	Omusati	95%	95%	63%	95%	95%	24%	97%	12,414	12,964	7,269
3	Oshana	99%	99%	89%	98%	98%	83%	99%	2,494	3,468	1,402
4	Ohangwena	91%	91%	60%	93%	92%	41%	95%	25,015	20,378	14,358
5	Oshikoto	80%	79%	55%	80%	80%	24%	86%	43,599	42,687	29,945
6	Kavango East	94%	94%	63%	83%	82%	52%	95%	9,841	28,330	7,780
7	Zambezi	92%	92%	52%	78%	78%	40%	93%	8,240	23,508	7,606
8	Erongo	95%	95%	93%	94%	94%	89%	96%	9,924	12,630	9,581
9	Otjozondjupa	82%	82%	63%	75%	75%	44%	83%	28,914	41,515	27,795
10	Omaheke	62%	62%	41%	57%	57%	0%	66%	29,811	34,020	27,286
11	Khomas	98%	98%	97%	97%	97%	95%	98%	9,924	12,346	9,547
12	Hardap	82%	81%	66%	77%	76%	59%	82%	17,628	22,157	17,371
13	!Karas	84%	83%	70%	81%	80%	52%	84%	14,476	17,194	14,230
14	Kavango West	68%	68%	27%	59%	57%	14%	72%	28,992	38,005	25,282

Population Coverage 2021

	Region_Name	Population Coverage 2G	3G	4G	Broadband	People not covered 2G	3G	4G	Broadband	Total Fibre
1	Kunene	66%	50%	33%	50%	36,817	54,792	73,110	54,400	821km
2	Omusati	99%	97%	82%	97%	1,865	9,069	48,504	7,479	384km
3	Oshana	100%	99%	96%	99%	108	1,501	7,533	1,099	207km
4	Ohangwena	99%	94%	90%	96%	2,298	17,305	26,486	12,260	199km
5	Oshikoto	99%	86%	73%	89%	2,887	30,195	57,636	24,328	645km
6	Kavango East	97%	90%	69%	91%	4,622	15,526	50,734	15,373	711km
7	Zambezi	100%	94%	60%	95%	191	5,919	41,985	4,877	498km
8	Erongo	98%	96%	92%	96%	4,461	9,671	17,616	9,640	2,164km
9	Otjozondjupa	94%	84%	72%	85%	9,551	26,569	45,866	25,062	1,837km
10	Omaheke	88%	66%	48%	66%	9,309	27,247	41,581	26,816	1,354km
11	Khomas	99%	97%	96%	98%	6,826	12,142	17,447	11,545	1,904km
12	Hardap	87%	80%	72%	80%	12,364	19,385	26,711	18,760	2,372km
13	!Karas	89%	83%	73%	83%	9,912	15,252	24,113	14,943	3,044km
14	Kavango West	94%	74%	40%	77%	5,818	23,724	55,271	21,518	385km
	Namibia	**96%**	**89%**	**79.0%**	**90.2%**	**107,031**	**268,296**	**534,593.1**	**248,099.8**	**16,524km**

8. Broadcasters

As of the end of Q1 of 2023, a total of 36 broadcasting licenses were issued.

Table 4: Licensed Broadcasters		2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1
Category	Signal distributors	1	1	1	1	1	1
	Public broadcasters	1	1	1	1	1	1
	Commercial broadcasters	21	21	21	20	21	21
	Community broadcasters	15	15	14	13	14	13
Total		38	38	37	35	37	36

During the first quarter of 2023, the broadcasting sector experienced a 6% decline in revenue compared to the previous quarter, Q4 of 2022.

Notably, advertisement revenue experienced a substantial decline of 26% when compared with Q4_2022. Advertisement revenue constituted approximately 8% of the overall revenue generated by broadcasters.

Table 5: Broadcasters Revenue	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	Change (%)
Advertisement revenue ("000")	14,584	18,358	16,724	20,895	18,409	22,828	17,009	23,844	17,630	-26%
Other Revenue ("000")	216,542	215,172	216,455	216,147	204,641	208,144	208,773	214,419	205,928	-4%
Total Revenue ("000")	231,126	233,530	233,179	237,042	223,050	230,972	225,782	238,263	223,558	-6%
Advertisement as % of total	6.3%	7.9%	7.2%	8.8%	8.3%	9.9%	7.5%	10.0%	7.9%	-2%

Pay TV subscriptions exhibited an overall increase of 3%, with digital terrestrial subscribers (Go TV) leading the way by recording a 14% increase.

Table 6: Pay TV Subscribers	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	Change (%)
Digital Mobile	23,863	28,687	126,034	109,662	169,612	160,908	151,766	151,621	150,917	-0%
Digital Terrestrial (Go TV)	67,150	67,065	65,071	59,148	59,523	58,622	56,129	50,039	56,878	14%
Satellite TV (DSTV)	132,458	129,421	131,723	125,688	128,356	120,238	124,703	123,456	126,740	3%
Total	223,471	225,173	322,828	294,498	357,491	339,768	332,598	325,116	334,535	3%

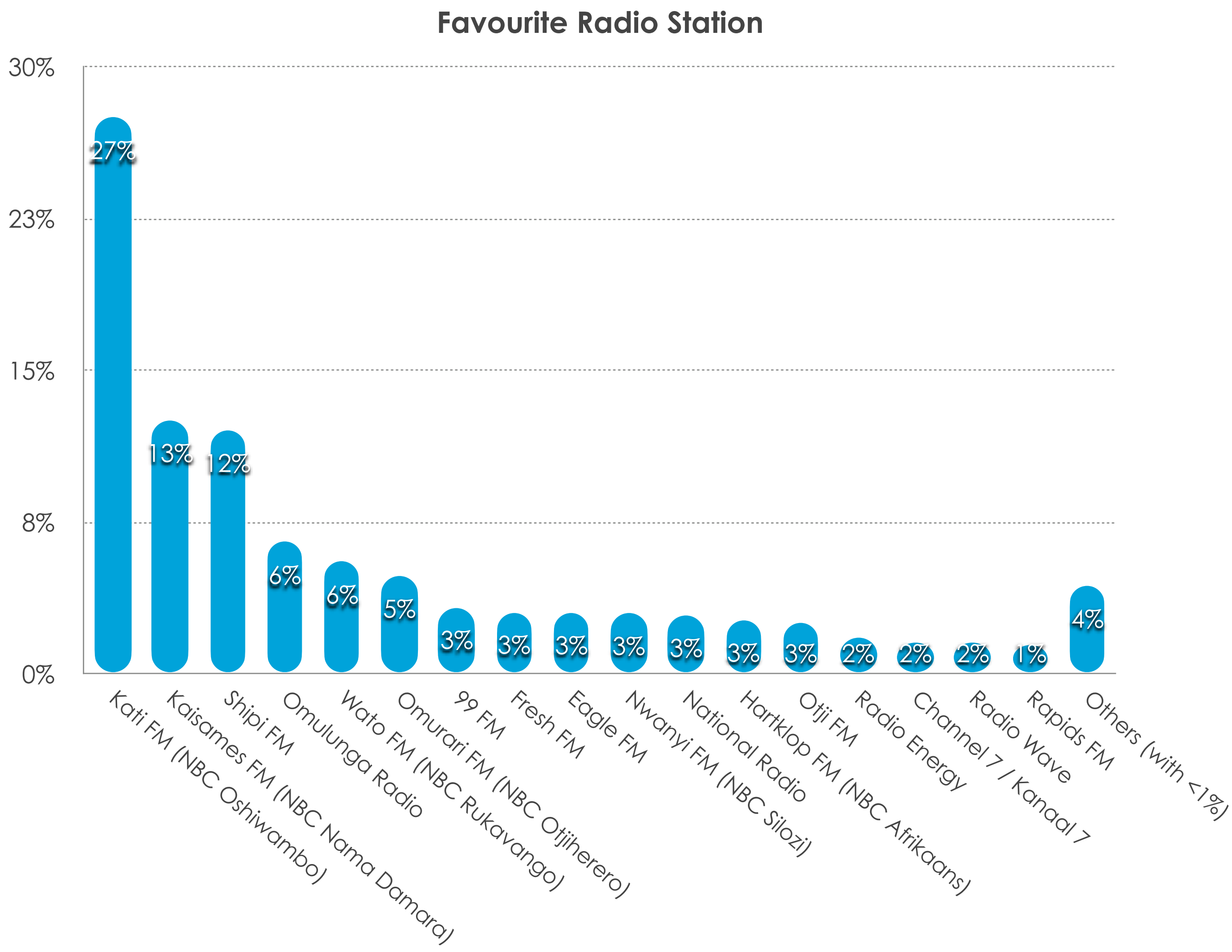
9. Postal

During the first quarter of 2023, there has been a significant of 55% increase in the utilisation of post-boxes. This might suggest a strong demand for post-box services.

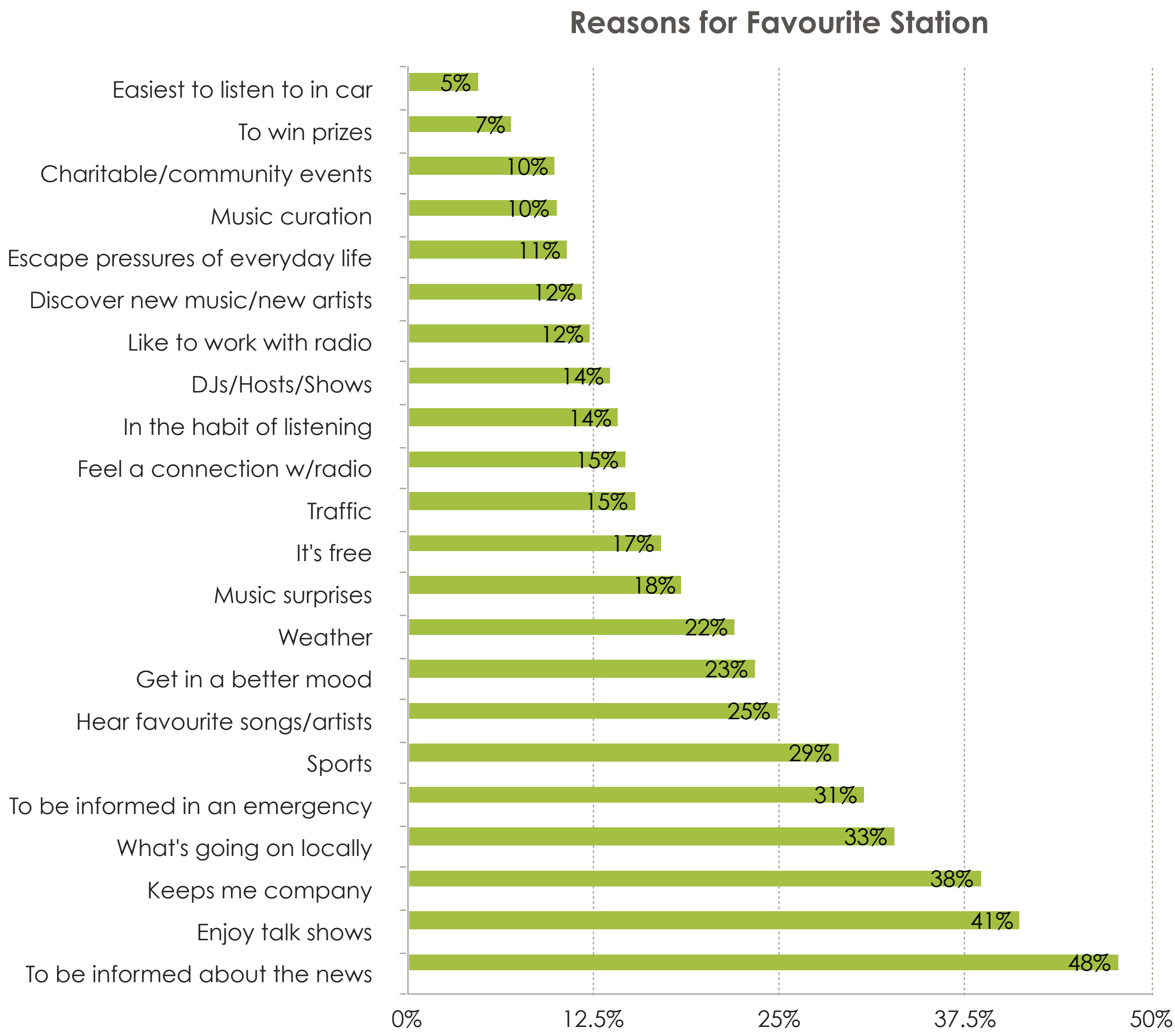
Table 7: Post Boxes	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	Change (%)
Number of Letterboxes	124,210	124,210	124,210	124,210	124,210	0%
Number of Postboxes occupied	81,332	83,269	83,269	47,171	73,339	55%
Occupancy %	65%	67%	67%	38%	59%	21%
Number of Private bags	871	877	877	883	883	0%
Number of Private bags occupied	421	437	456	385	390	1%
Occupancy %	48%	50%	52%	44%	44%	1%
Number of Post Offices	133	134	133	133	137	3%
Post Offices in rural areas (including mobile post offices)	116	116	116	116	116	0%
% of Post Office services in rural areas	87%	87%	87%	87%	85%	-3%

10. Broadcasting and Media Survey 2022

Continuing with the presentation of survey results from the 2022 Media Survey conducted by Vision Africa Research Services, this report serves as a follow-up to the previous findings presented in the Q4 2022 edition of the Stats Newsletter.



Based on the interview results, Kati FM, Kaisames FM and Shipi FM emerged as the preferred radio stations in the respective order of popularity.



Respondents indicated that their primary reasons for listening to the radio, is to tune in for news updates (48%), followed by talk shows (41%) and for the companionship provided by the radio (38%).

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