



# Telcwatch

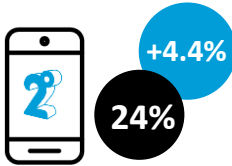
Quarter 3, 2023

## Report Overview

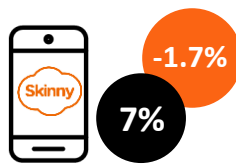
Telcwatch is the quarterly market share report for New Zealand’s major mobile phone carriers. This report presents key metrics and insights for Quarter 3 2023, a three-month period ending 30 September 2023.

## Change in Market Share

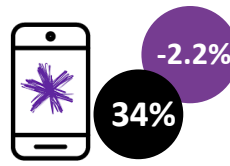
### 2degrees



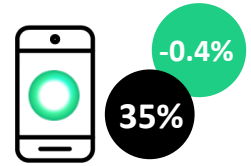
### Skinny



### Spark



### One NZ

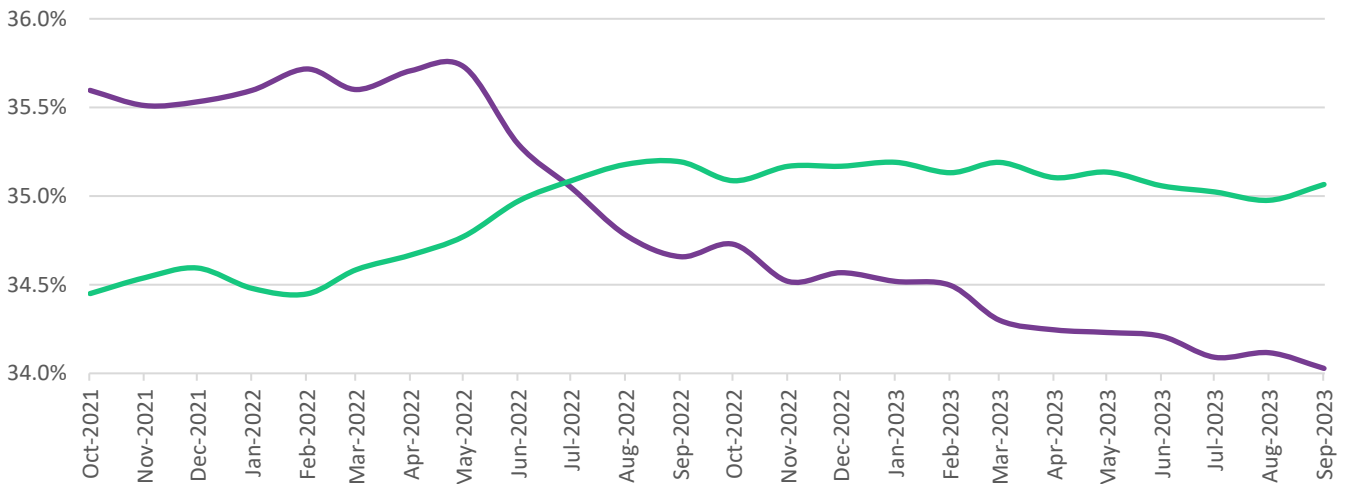


Note: \*The black circles above represent each carrier’s market share in Quarter 3 2023, whilst the coloured circles represent the annual relative % change.

2degrees was the strongest performer of Quarter 3 and was the only provider to increase its market share over this period. Skinny suffered the most significant slump of the major telco providers, with their market share decreasing by 4.3% compared to Q2, whilst Spark and One NZ experienced smaller decreases of 0.4% and 0.2% respectively.

While One NZ has consistently remained at a market share of around 35% over the past five quarters, Spark has decreased in market share consistently since May of 2022 to finish Q3 2023 at 34%, its lowest over the past 2 years.

The big news in the NZ Telco Market over the past 3 months has been Mighty Ape jumping into the telco arena with Mighty Mobile last month. Operating under the One NZ network, Mighty Mobile looks set to shake up the telco competition by providing a unique “Fast, Faster and Fastest” unlimited, max speed data plan. We’ll keep an eye on the impact that Mighty Mobile has on the NZ Telco environment in next months Telcwatch.

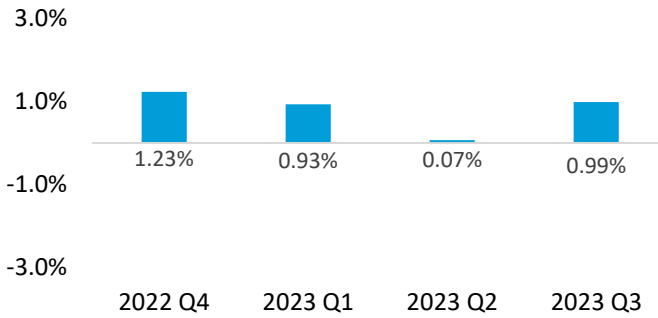




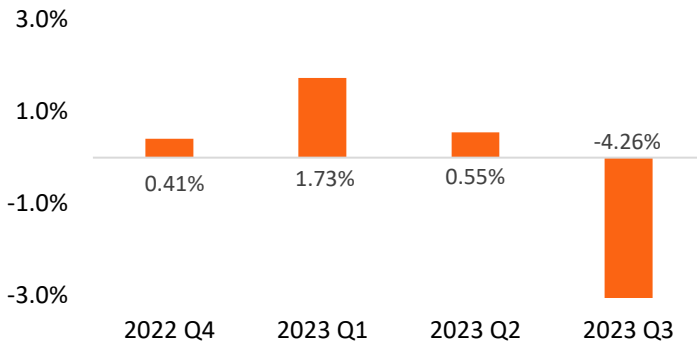
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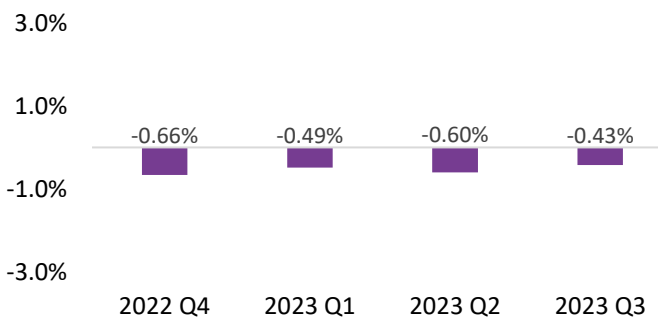
## Mobile Phone Carrier Performance over the past 12 months



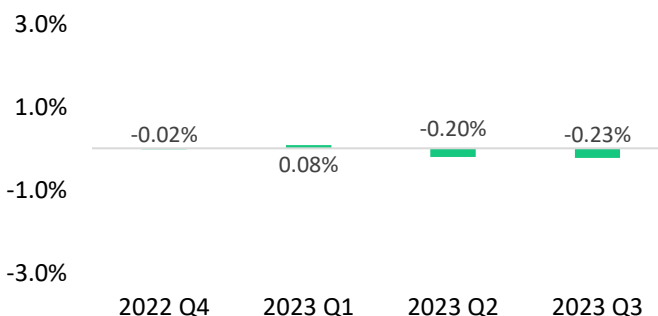
2degrees has experienced five consecutive quarters of growth and was the only telco out of the 4 major providers to experience QoQ Growth in Q3 of 2023.



Following a full year of growth of its own, Skinny has experienced the worst Q3 of any of the Big Four Telco Providers, with market share decreasing by over 4% for the quarter.



Spark's struggles have continued for a fifth consecutive quarter, despite posting profits in excess of \$1B following the sale of a majority stake in its cell phone towers and ending its ambition to become a major player in the sports content market.



One NZ has continued to experience the smallest fluctuations in market share over the past year, indicating that they are performing well with retaining their customers compared to other providers.



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## About this report

### Purpose

Modica Group's secure SMS messaging services platform creates a wealth of valuable data every day, and Datamine's mission is to unlock the value in data. Datamine and Modica Group have therefore partnered together to provide an unbiased, empirical view of New Zealand's telco market share.

### Data Source

This report analyses over 2.9 million unique active mobile devices every month and is a statistically significant representation of the New Zealand market.

The majority of market share reports in this space are produced with SIM card data, message volume or historical data. Our approach is to analyse only active mobile devices and removes machine-to-machine devices, smart meters, non-New Zealand networks and non-consumer networks. The result is a reliable and accurate depiction of the current New Zealand market share for each mobile carrier.

The sample size makes this data set an accurate measure of the Telco market share in New Zealand with a relative error not exceeding 0.5% calculated at 95% confidence.

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## Contact Us

If you have any questions about this report, contact us at [telcwatch@datamine.com](mailto:telcwatch@datamine.com)

## Disclaimer

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