



Telcwatch

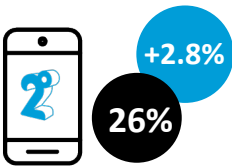
Quarter 1, 2025

Report Overview

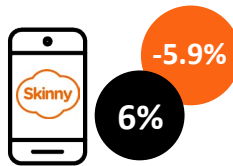
Telcwatch is the quarterly market share report for New Zealand’s major mobile phone carriers. This report presents key metrics and insights for Quarter 1 2025, the three-month period ending 31 March 2025.

Story of the Quarter: One NZ widens the gap against Spark

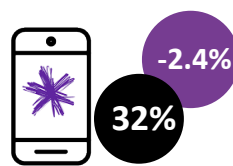
2degrees



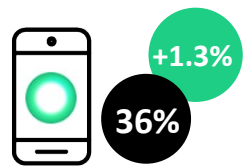
Skinny



Spark



One NZ

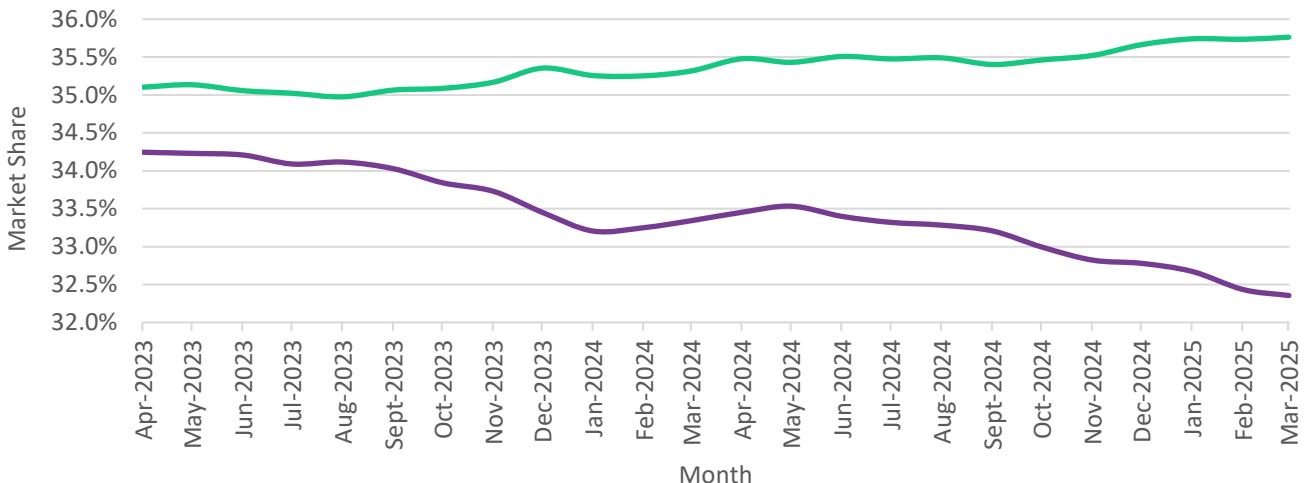


Note: The black circles above represent each carrier’s market share in Quarter 1 2025, whilst the coloured circles represent the annual relative % change.

2degrees once again showed strength in Q1 2025, with the highest relative growth at 2.8% for another consecutive month. On the other hand, Skinny is still struggling, with -5.9% relative change in market share, and the trend from 2024 continuing.

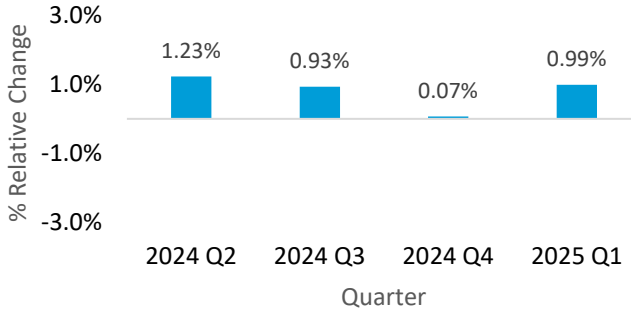
For the biggest players, One NZ and Spark – One NZ is widening the gap, with another quarter of market share growth. Spark, however, has seen a steeper decline this quarter, ending the quarter at just 32% share.

Market Share Competition: Spark vs. One NZ

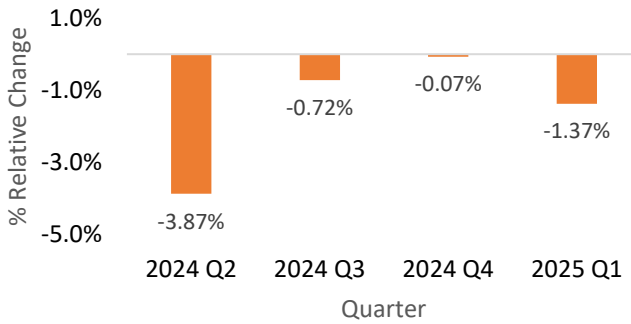




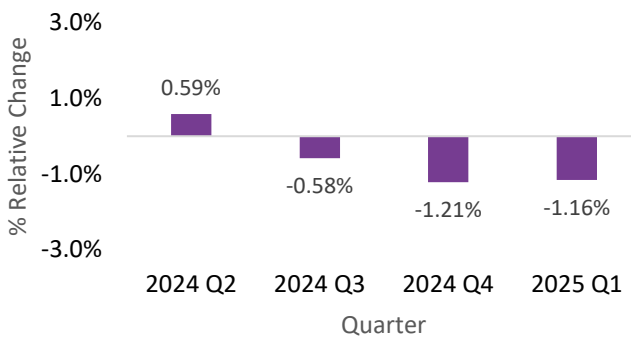
Mobile Phone Carrier Performance over the past 12 months



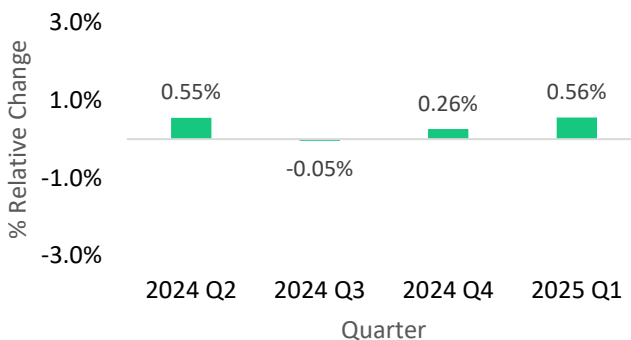
2degrees saw another quarter of strength in Q1, building on it's growing share



Skinny was able to hold on to it's 6% share of the market this quarter despite seeing another negative relative change



Spark saw a steeper decline this quarter, down to 32% market share, despite being able to regain some share this time last year



One NZ maintains a strong position at the top of the market, with slight growth again this quarter



Telcwatch

Quarter 1, 2025

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.

Contact Us

If you have any questions about this report, contact us at telcwatch@datamine.com

Disclaimer

This report is a joint initiative between Datamine and Modica Group. While every effort has been made to ensure the accuracy of this report, Datamine and Modica Group are not responsible for and expressly disclaim all liability for, damages of any kind arising out of use, reference to, or reliance on any information contained in this report.