



# Telcwatch

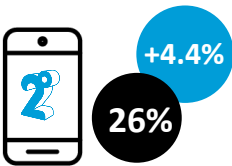
Quarter 2, 2025

## Report Overview

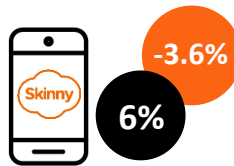
Telcwatch is the quarterly market share report for New Zealand’s major mobile phone carriers. This report presents key metrics and insights for Quarter 2 2025, the three-month period ending 30 June 2025.

## Story of the Quarter: The Gap Stabilises

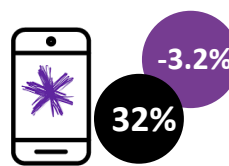
### 2degrees



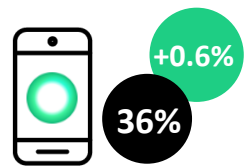
### Skinny



### Spark



### One NZ

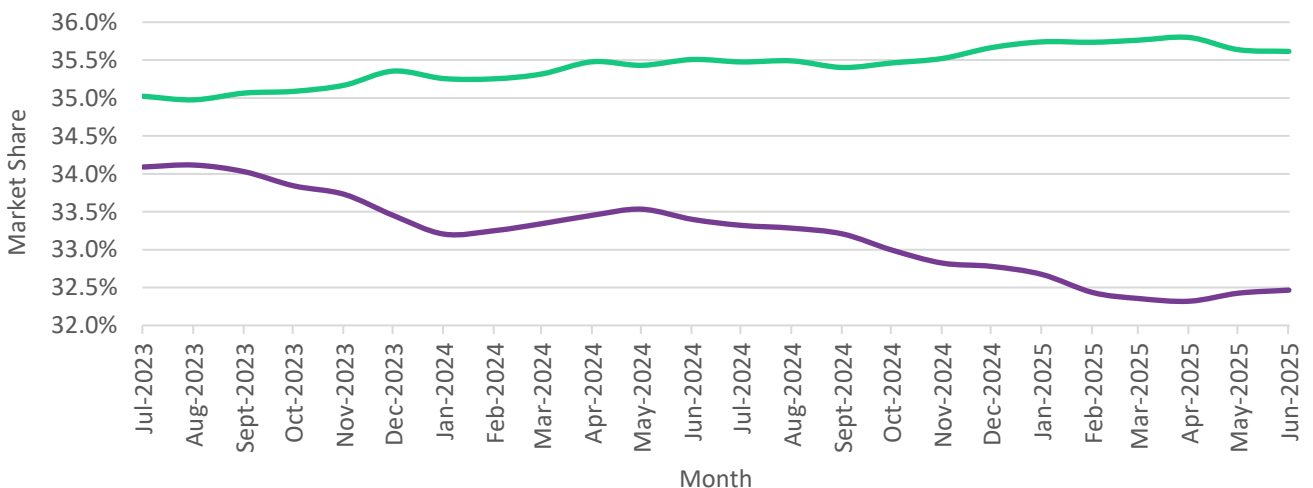


**Note:** The black circles above represent each carrier’s market share in Quarter 2 2025, whilst the coloured circles represent the annual relative % change.

2degrees continues its dominance in growth mode, with a massive 4.4% relative increase in share YoY, the highest we have seen this year. On the other hand, Skinny struggles with a 3.6% negative change YoY, but still managing to hold on to its 6% share of the market.

For the biggest players, One NZ and Spark, the gap which has been growing consistently for the past 24 months stabilises, even narrowing slightly this quarter.

## Market Share Competition: Spark vs. One NZ





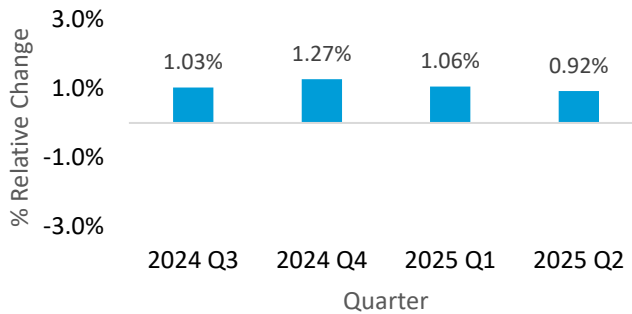
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## Mobile Phone Carrier Performance over the past 12 months



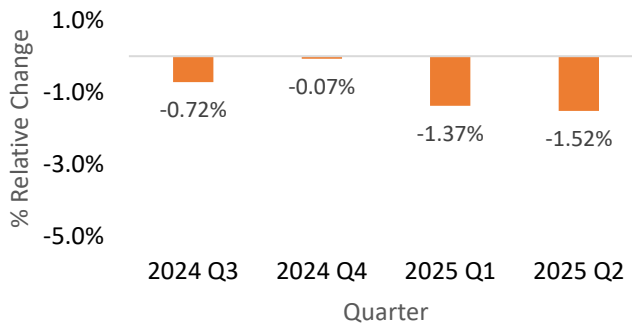
2degrees



2degrees retains its strong growth in Q2, again building on its share of the market. This is the only brand to see positive relative change this quarter.



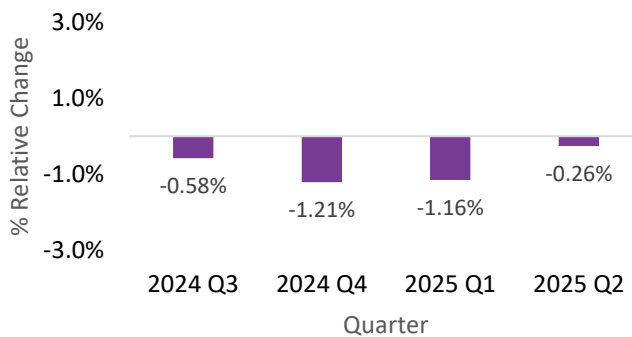
Skinny



Skinny continues to struggle, with a slightly steeper decline this quarter, though continues to hold its 6% share



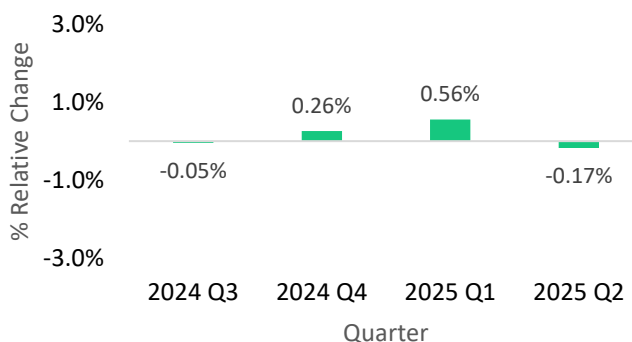
Spark



Spark again sees red this quarter, with a -0.26% drop in relative change, although less severe than previous quarters



One NZ



Despite a slight drop this quarter, One NZ holds its position as the dominate brand in the market.



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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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