



# Telcwatch

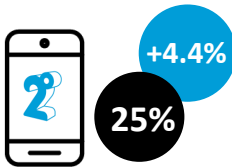
Quarter 4, 2023

## Report Overview

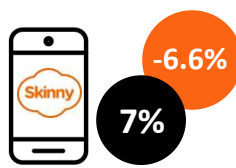
Telcwatch is the quarterly market share report for New Zealand’s major mobile phone carriers. This report presents key metrics and insights for Quarter 4 2023, a three-month period ending 31 December 2023.

## Story of the Quarter: 2degrees close out an impressive 2024 as Spark continues to fade

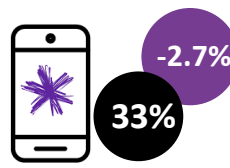
### 2degrees



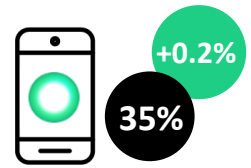
### Skinny



### Spark



### One NZ



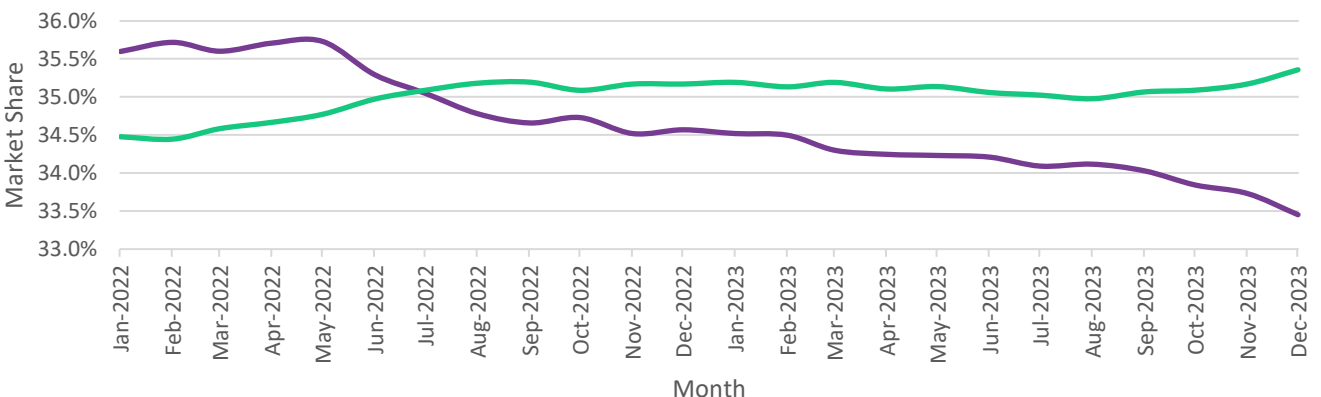
Note: \*The black circles above represent each carrier’s market share in Quarter 4 2023, whilst the coloured circles represent the annual relative % change.

2degrees experienced a growth in market share every quarter in 2023 and came out on top as the strongest performer of Quarter 4. In contrast, Skinny suffered the most significant slump of the major telco providers, with a decrease in market share of 6.6% over the year – although with the lowest market share of the telco providers, this decrease amounts to a smaller number of customers. Spark also experienced their worst quarter of 2023, rounding out a full year of negative growth.

The gap between One NZ and Spark’s market share is expanding, with no apparent sign of slowing over the coming months. One NZ has continued strengthening its position as the market leader, with a share of around 35.5% at the end of 2023. Spark’s continued decline concludes two miserable years of performance since One NZ overtook them in July 2022, as demonstrated in the chart below.

Over the last quarter, the big news in the NZ telco market has been 2degrees’ acquisition of My Republic’s broadband customers in August. Elsewhere, Mighty Mobile are using One NZ’s existing telco network to shake up the market with an entirely different offering that features unlimited high-speed data, calls, and texts.

## Market Share Competition: Spark vs One NZ

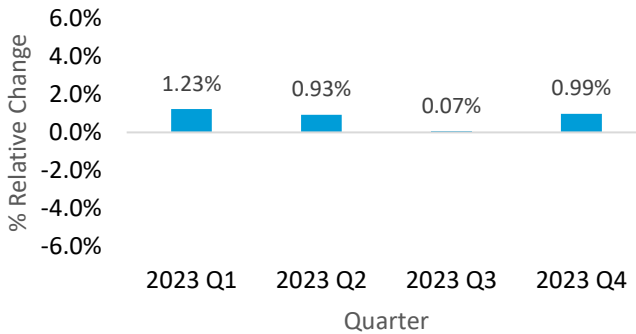




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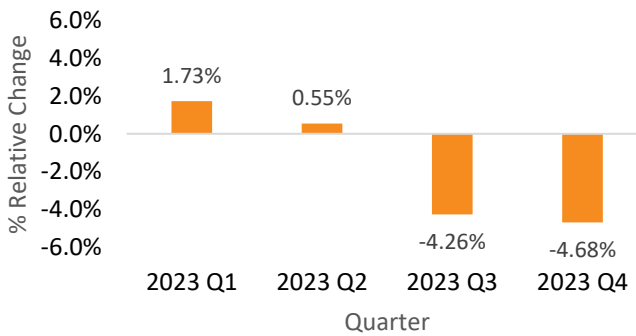
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## Mobile Phone Carrier Performance over the past 12 months



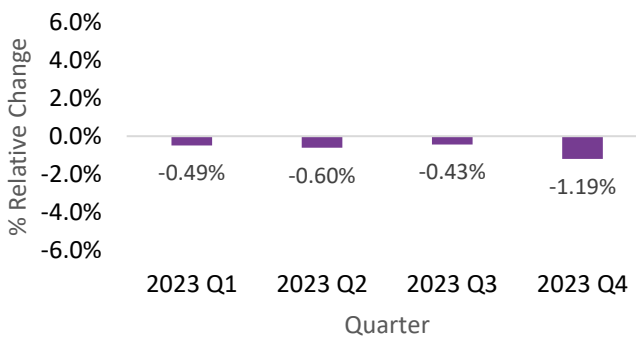
2degrees was the strongest-performing major telco in 2023, finishing on a market share of 25% to close the year.

This represents a 1.5% increase compared to the end of 2022.



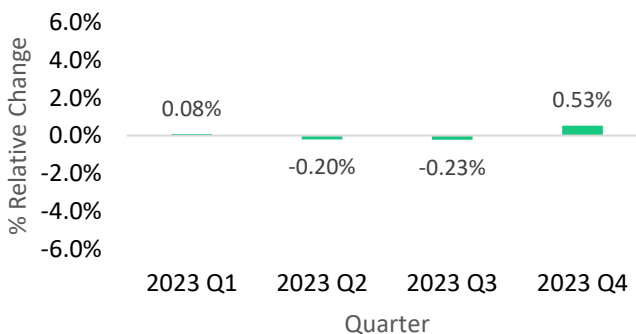
Skinny had a difficult second half of 2023. Before July, Skinny had been performing well, with four consecutive quarters of growth.

Skinny's market share decreased from 7.2% to 6.7% over 2023.



Spark has been struggling for six consecutive quarters, with Q4 representing the worst decrease of the year.

From the start of 2023, their market share decreased from 34.6% to 33.5%.



One NZ had an eventful year with their official rebranding in early 2023.

They rounded off the year with their strongest quarter, experiencing a relative increase in market share of 0.53% - amounting to a 0.2% increase for 2023.



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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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