

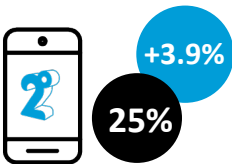


Report Overview

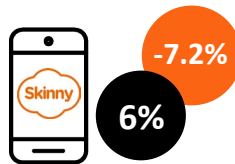
Telcwatch is the quarterly market share report for New Zealand’s major mobile phone carriers. This report presents key metrics and insights for Quarter 4 2024, the three-month period ending 31 December 2024.

Story of the Quarter: 2degrees emerges as the growth leader in Q4

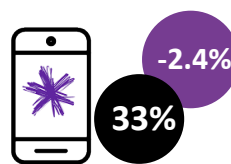
2degrees



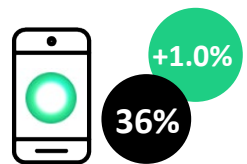
Skinny



Spark



One NZ

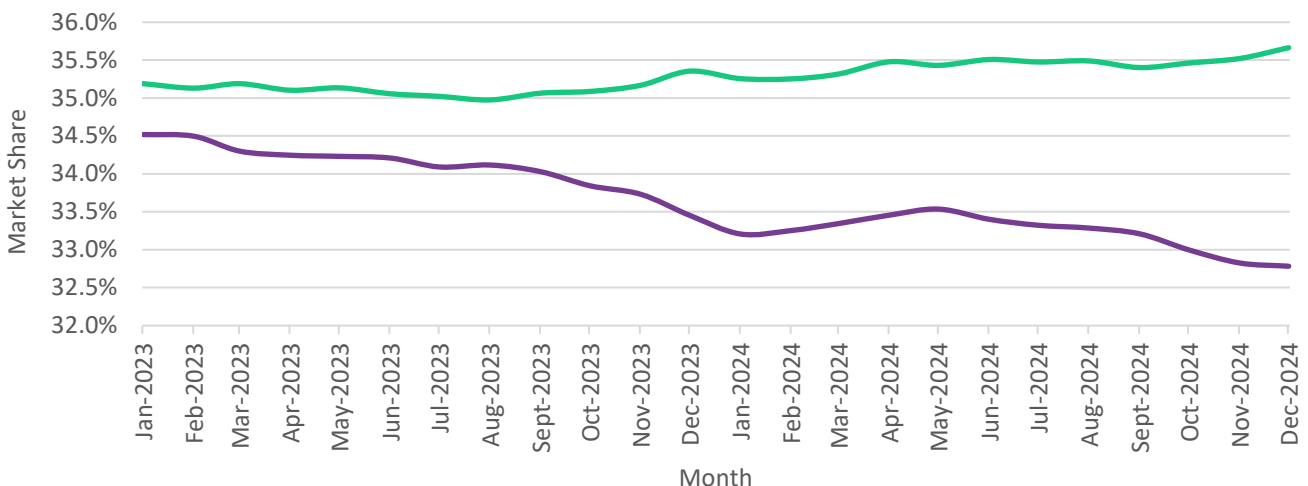


Note: The black circles above represent each carrier’s market share in Quarter 3 2024, whilst the coloured circles represent the annual relative % change.

2degrees emerged as the strongest performer in Q4 with the highest relative growth at 3.9% and steadily gaining market share. This is in sharp contrast to Skinny which continued to lose market share over the same period.

For the stable players, One NZ and Spark – One NZ reinforced its position as the market leader, showing consistent gains and positive momentum over the past two years. Meanwhile, Spark experienced a gradual but persistent decline in market share, widening the gap between the two competitors. The trends highlight One NZ's strength in the market and Spark's ongoing challenges in maintaining its competitive position.

Market Share Competition: Spark vs. One NZ

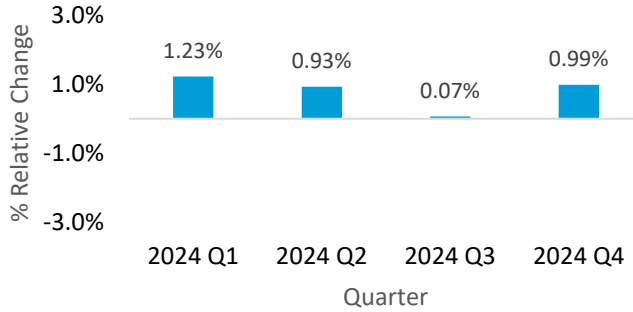




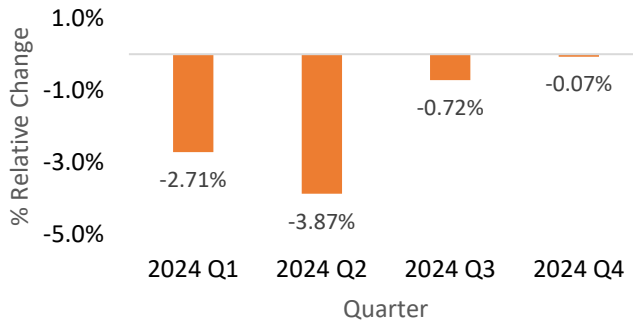
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Quarter 4, 2024

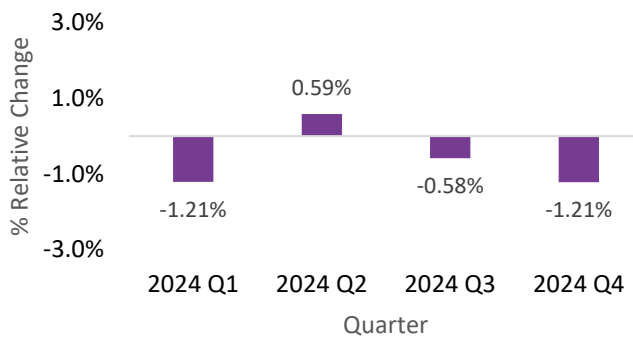
Mobile Phone Carrier Performance over the past 12 months



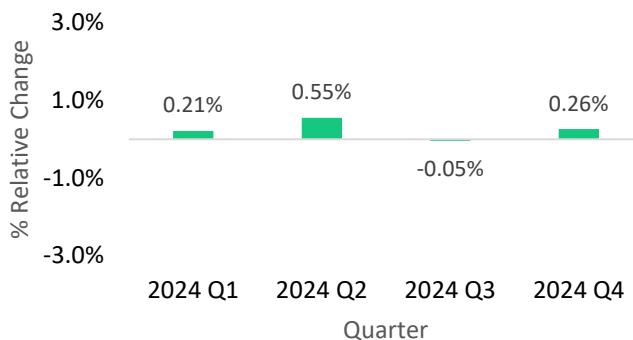
2degrees continued to increase in share in Q4, outperforming all other providers.



Skinny was able to retain 6% of market share for a second quarter with another, albeit much smaller, decrease in share.



Spark share has fluctuated over the past year, resulting in a 0.8% decrease from where it started in Q1.



One NZ maintains a stable position in the market at the top, with small changes over the past year.



Telcwatch

Quarter 4, 2024

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

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