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## Market reports

# AUSTRALIAN MOBILE SERVICES MARKET, JUNE 2009 UPDATE & 2009-2013 FORECAST

### September 2009

Telsyte's latest research into Australia's mobile market finds that the local mobile services industry grew strongly in the first six months of 2009 as if there was no recession. 3G users outnumbering 2G, VHA officially overtaking Optus in the all-important 3G space, and a slew of new MVNOs – including supermarket giant Woolworths – entering the market highlighted the country's fastest-growing telecom segment in the first half of this year.

This study comprehensively analyses the key performance indicators (KPIs), including subscriber numbers, revenue and ARPU, of Telstra, Optus, VHA and MVNOs as of June 2009. Taking into account the industry's fast developments and rapidly-changing competitive landscape, it also provides updated 5-year forecasts from 2009 to 2013. Key findings from this study include:

- One million new mobile users were added, taking the total number to 24.5 million or 113% of the population. Mobile broadband, the rapid migration of 2G to 3G, and the Apple iPhone were notable contributors that drove half-year service revenue to enjoy double-digit annual growth. Serving one in four mobile users, the newly formed VHA was virtually neck-and-neck with Optus in terms of revenue, and became a strong number-two player in the high-ARPU 3G segment.
- Telstra boasted the industry's highest 3G user base and non-voice revenue mix, at almost 40% of its total revenue pool, while Optus displayed its resilience through an almost 50% expansion in its 3G user number. Although diluted by Vodafone's 2G business, VHA enjoyed an industry-leading ARPU of \$47.5.
- All players, including MVNOs as a group, experienced a year-on-year ARPU rise, thanks to Australians' growing love affair with non-voice services, which now make up well over one-third of their mobile bills. The first half of this year also witnessed a larger role by MVNOs following a slew of non-traditional MVNOs jumping on the mobile broadband bandwagon.
- With the Australian and global economies starting to show signs of recovering, the local mobile market is projected to remain very strong. Telsyte estimates the number of mobile users will reach 25.3 million by the end of 2009, 116% penetration, rising to nearly 30 million in 2013, or 129% of the population. Service revenue, meanwhile, is projected to grow at an average annual rate of 6.4% to reach \$16.8 billion in the next four years, with non-voice revenue exceeding voice revenue in as early as 2011.

**Australian Mobile Services Market, June 2009 Update & 2009-2013 Forecast** is a 16-page report costing \$1,500 (excluding GST) and includes 5 Figures and 6 Tables.

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