

Australia Telecommunications Report Q3 2016

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Abstracts

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BMI View: BMI has made some minor forecast revisions in our latest Australian telecommunications market Q3 2016 report update. We hold the view that the 3G/4G uptake will intensify further. Additionally, we believe that the mobile market is mature and has little prospects for new organic subscriber driven growth. Our core view remains that market growth will derive from migrating existing subscribers onto high-value, advanced data packages. Telecom operators are aggressively marketing their 4G LTE services and we believe that advanced data plans and converged services will be critical to future revenue growth.

Key Data

We estimate 31.7mn mobile subscribers at the end of Q4 2015, with Telstra continuing to dominate.

The NBN has a monopoly on advanced fixed broadband technologies, but uptake remains low, with 600,000 customers compared with over 5mn for DSL and 6mn for dedicated mobile broadband.

New services will drive the market, such as LTE, which already represents over 40% of operators' customer bases, and M2M, with Telstra leading the way with 1.7mn connections.

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