

Roaming Tariff Market Size, Share & Trends Analysis Report By Roaming Type (National, International), By Distribution Channel, By Service (Voice, Data), By Region, And Segment Forecasts, 2023 - 2030

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Abstracts

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Roaming Tariff Market Growth & Trends

The global roaming tariff market size is expected to reach USD 113.41 billion by 2030, expanding at 6.0% CAGR from 2023 to 2030, according to a new study by Grand View Research, Inc. The increasing adoption of high-end mobile devices enabled with 3G, and 4G networking capabilities are expected to drive market growth. Similarly, the emergence of 5G is also anticipated to power the growth of the roaming tariff industry.

High competition among key players in the roaming tariff industry has resulted in companies introducing international roaming packages to maintain their customer base. The companies are doing this to restrict customers from switching from one service provider to another due to price differentiation. These factors are expected to fuel market growth.

Roaming enables users to use their mobile devices outside the pre-defined geographical coverage. Roaming tariffs are the extra charges roamers pay when they utilize a foreign network. These additional charges are paid for various roaming services, such as SMS, data, and voice. Multiple factors are anticipated to fuel the growth of the roaming tariff industry.

The rising growth of mobile phone users, the growing popularity of 3G and 4G-enabled

smartphones, the increasing number of unique subscribers, and global penetration of mobile internet among others. These factors are anticipated to positively impact the roaming tariff industry growth over the forecast period.

Companies in the roaming tariff industry have launched various strategic initiatives aimed at reducing operational costs for roaming services. For instance, CELL C (South African mobile network provider) announced 61% of its network had migrated to partner towers, as a part of its network migration strategy.

The strategy involves eliminating spending money on infrastructure, and a telecom provider operating as a wholesale buyer of capacity and services. This strategy enables telecom providers to permanently offer roaming services via other networks. The company has achieved tremendous success in implementing this strategy which has enabled 100% migration in six provinces.

Companies in the roaming tariff industry are also undertaking various mutually beneficial initiatives for themselves and the market alike. Major mobile network operators formed a non-profit association in 2015, named LoRa Alliance, aimed at collaborating and promoting LoRaWAN standard as the major open global standard for secure IoT LPWAN connectivity.

In January 2021, LoRa Alliance announced the deployment of roaming-capable platforms by multiple network operators, with full LoRaWAN roaming capabilities across 27 countries.

Roaming Tariff Market Report Highlights

The national roaming type segment dominated the market in 2022 and is expected to continue leading over the forecast period. The market is expected to witness growth in developed and developing countries. For instance, in the U.S., national and international roaming share similarities owing to the presence of key players. These key players must sign national roaming agreements to offer international roaming services globally

Retail roaming emerged as the most significant distribution channel in 2022. The segment is also expected to grow substantially during the forecast period. Retail roaming services are when several Mobile Virtual Network Operators (MVNOs) and Mobile Network Operators (MNOs) offer their roaming services directly to individual customers

Europe is anticipated to grow at a significant CAGR over the forecast period. The growth can be accredited to the rising disposable income among the upper- & middle-class population. Additionally, the European Commission introduced the 'Roam like at Home' policy to avoid additional roaming charges and reduce bill-related consumer anxiety

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