

# Australia - Telecommunication Services: Saturated market with opportunities for growth (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

The Internet and data category remains one of the key segments for Australian telecoms with revenues accounting for 56.9% of the total in 2016. One of the ways this segment will grow is by reducing the churn rate, therefore securing customers long-term. Annual mobile churn rate declined from 21.4% in 2012 to 16.3% in 2016, and is estimated to be at 13.0% in 2021. One of the ways this will be achieved is through government initiatives such as the Mobile Black Spot program, which aims to improve network coverage in remote locations. Under this program, the government plans to invest US\$448 million in the establishment of 750 new mobile base stations and over 86,000km of new coverage area.

MarketLine's Premium industry reports provide a comprehensive market view including sections on: industry risk & reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, and innovation.

### KEY HIGHLIGHTS

Mobile outpaces the fixed segment

Fixed-line revenue rose at a CAGR of 0.03%, from US\$9,480.8 million in 2012 to

US\$9,492.0 million in 2016 and will post a CAGR of 1.0% to reach US\$9,989.6 million in 2021. The increase will be a result of a rise in packet switched revenue. Total mobile revenue declined at a CAGR of -3.8%, from US\$17,559.9 million in 2012 to US\$15,043.0 million in 2016 due to a fall in voice revenue. However, driven by the demand for data, revenue will grow at a CAGR of 2.6% to reach US\$17,065.0 million in 2021.

### In Mobile Telstra leads in subscriptions and MOU

Telstra leads the mobile segment. Its subscription base rose at a CAGR of 5.6%, from 14.5 million in 2012 to 18.1 million in 2016. It also had the lowest churn rate and the highest MoU in 2016. An extensive network and a range of services are the major reasons for Telstra's dominance.

### National broadband network rollout drives growth in subscriptions

Fixed-broadband subscriptions increased at a CAGR of 5.8%, from 5.9 million in 2012 to 7.4 million in 2016 and will increase at a CAGR of 4.7%, to reach 9.3 million in 2021. Fixed-broadband penetration stood at 30.1% in 2016 and will reach 35% in 2021 as a result of the development of optic fibre infrastructure and the continued rollout of the national broadband plan.

## SCOPE

**Risk/Reward Index** - enables you to assess the risks and potential rewards of investing in the Australian Telecommunications market in comparison with other Asia-Pacific countries.

**Industry Snapshot and Industry View** - Key Telecommunications Industry Statistics including fixed/mobile revenue, subscriptions, churn, market share, and ARPS are analyzed to reveal the key issues and trends driving market performance in the Australian Telecommunications market.

**Industry SWOT Analysis** - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Australian Telecommunications market.

**Industry Benchmarking** - Benchmark how the Australian telecommunications market is performing compared to regional and global markets in terms of fixed

or mobile revenue, subscriptions, ARPS, penetration, and usage to gauge potential for growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading players in the Australian Telecommunications market by business segment on metrics such as churn, ARPU, and subscriber and revenue growth.

## **REASONS TO BUY**

How is the market performing in terms of: Revenues, Subscribers, ARPU, and Customer Churn?

How risky is it to invest in the Australian Telecommunications industry compared to other Asia-Pacific countries?

What is driving the performance of key industry segments such as Voice, Data, Prepaid, Postpaid, Broadband, and IPTV?

Who are the leading players in the Australian Telecommunications industry and how does their performance compare?

What trends are being witnessed within the Australian Telecommunications industry?

How will the breakdown for mobile connection technologies look by 2021?

What are the Australian Telecommunications industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

How has the financial deals landscape changed in 2015 and 2016?

## Contents

Risk & Reward Index  
Industry Snapshot  
Industry View  
Industry SWOT Analysis  
Industry Benchmarking  
Industry Performance  
Competitive Landscape  
Innovation  
Deals  
Key Developments  
Appendix

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