

Australia Mobile Virtual Network Operator (MVNO) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Australia Mobile Virtual Network Operator Market size is estimated at USD 0.85 billion in 2024, and is expected to reach USD 1.19 billion by 2029, growing at a CAGR of 6.80% during the forecast period (2024-2029).

Key Highlights

Australia is a developed country at the forefront of new technologies, including mobile phones, eSims, and devices. Australians have been using the device for various purposes since mobile phones were introduced in the country. The use of mobile phones is increasing, and consumers are becoming more and more interested in interacting with online products and services. The level of smartphone penetration in the coming years is expected to increase significantly, given the closure of 2G networks and the introduction of 5G.

In line with Industry 4.0, the government's efforts to create a value-based economy by increasing smartphone adoption and video usage have driven mobile data traffic growth over the past few years owing to immersive media-rich services, new online gaming technologies, and extended reality (XR) applications.

With this, the demand for high-speed data transmission for web conferencing, video streaming, and other applications, such as online shopping and social media, is witnessing a rise, thus driving the MVNO market in the country. The focus of MVNO service offers has switched from voice to data, and some have developed distinctive value propositions around integrated offerings connected to other products and services provided by the parent company, such as gaming or enterprise cloud services.

MVNOs' dependency on their parent MNO determines their type of operation. Hence, bad conduct on the part of an MNO towards MVNOs, such as fraudulent or unauthorized use by roaming subscribers and an unanticipated drop in quality of service, limits their expansion. Such turbulent times in the telecom markets cause a relatively high number of exits from the MVNO market, increasing the need to secure and solidify MVNO's market position. In such scenarios, increased dependency of the MVNO on the MNO for network access, customer management, billing, and other business applications is one of the major factors restricting the market's growth.

The after-effects of the COVID-19 pandemic on the telecommunications sector in the country led to increased digitalization across industries, telecom infrastructure development, expansion in rural and remote areas, high data consumption coupled with low latency 5G services will provide numerous opportunities for MVNO players to explore new sectors and niche segments. In addition, as more and more industries adopt digital channels after the COVID-19 pandemic, the MVNOs market is expected to benefit from the increased demand for cost-effective data, voice, and bundled services.

Australia Mobile Virtual Network Operator (MVNO) Market Trends

Service Operators Segment is Expected to Witness Significant Growth

Service provider MVNOs rely almost entirely on the infrastructure of the host MNO but offer services under their brand. They control billing, customer care, and sales, and the MNO handles the core network operations and maintenance. Depending on the wholesale agreement model, they can also offer self-owned SIMs and set tariff bundles and packages independently from the prices set by the host MNO.

Service operators provide a range of tailored-made services compared to the MNO, often providing generic service that suits the masses. Service providers tailor their offerings to different consumer needs, such as providing the best international rates for frequent out-of-country callers. This allows the MVNOs to take on unique value propositions to differentiate themselves from competitors in the market significantly.

Demands for better customer experience enable service providers to focus primarily on providing service rather than maintaining networks. These services offer a wide range of value-added support for the overall customer experience, including SMS content, voicemail, and real-time charging.

In February 2024, Telstra Group, an Australian telecommunications company, partnered with Ericsson to deliver 5G network slicing services in Australia. The company will leverage Ericsson Dynamic Network Slicing solution capabilities to fully operationalize and monetize network slicing to enable use cases like Fixed Wireless Access (FWA), broadcasting, and automotive connectivity, among others, on Telstra's 5G network.

The advent of 5G offers further growth potential for service providers to enhance their capabilities in the Australian MVNO market. 5G will enable MVNOs to deliver premium, dependable, and differentiated service experiences beyond standard mobile broadband and deliver service to meet the needs of specific customer use cases during the forecast period.

According to OpenSignal, in 2023, Australia's 5G upload speed was at 15.70 megabits per second, the fastest average 5G download speed was at 182.30 megabits per second, and Australia's highest peak download speed was at 565.60 megabits per second.

Overall, growing investments and developments in advanced 5G connectivity in Australia will offer lucrative opportunities for service providers in the region to extend their services across a broad range of customer use cases and deliver incredible value for customers and individual subscribers. MVNOs can offer services that provide stability, scalability, and control, as well as the capability to monitor the entire operation of the provided services, which is likely to propel the growth of the market.

Consumer Segment to Hold Major Market Share

Most MVNOs target the consumer segment to increase their market share. MVNOs serve customer segments' demands, offering personalization and flexibility to enhance the customer experience. Growing customer demands to be able to switch brands quickly to meet their expectations is encouraging MVNOs in Australia to focus on the pricing of services without the challenges of running the physical network.

The consumer segment is anticipated to witness substantial growth in the Australian MVNO market during the forecast period owing to the rising adoption of the B2C model or selling directly to consumers by network operators. There is a growing demand for mobile offers aimed at the general public, causing the MVNOs to implement the necessary processes to manage their subscriber base, billing, marketing and sales, as

well as providing support services.

Consumer MVNOs in Australia are rapidly making efforts to grow and retain their subscriber base by offering innovative services and benefits and encouraging referrals. Many MVNOs differentiate themselves by providing tailored mobile offers for subscribers traveling abroad through a local network partner (MVNE). Many are providing offers aimed at communities in their own language with attractive international rates. Community-based MVNOs opt for prepaid mobile plans to attract consumers looking for connectivity at competitive prices and ensure a smooth user experience. This is further propelling the market growth in the consumer segment.

In March 2024, Boost Mobile, a youth-focused telco brand, launched "Boost Broadband," its new range of NBN (National Broadband Network) and NBN+ (High-Speed Fibre to the home or workplace) offers for customers in Australia to access great deals on high-speed home internet. The company expanded beyond mobility offerings, providing a great customer experience and the best deals for Australian consumers. Through a partnership with BTB Australia, a provider of telecommunication services, Boost has become an Internet Service Provider (ISP) to offer a range of highly competitive NBN solutions to Australian households. The company has more than doubled its customer base in recent years.

In terms of operating mode, service providers are gaining rapid traction in the consumer segment in Australia. Service providers are focusing on consumer experience and value to meet the needs of Australian households for reliable high-speed internet delivered by local ISPs. Thus, Boost Mobile, in addition to its ISP business and NBN product offering, also launched eSIM capabilities on its prepaid offerings to further empower Australian consumers.

According to the Australian Communications and Media Authority, In 2023, in Australia, about 86% of adults in a survey about telecommunications stated they used their smartphones to access the internet multiple times in a day.

Overall, as Australian consumers move toward a consumer-focused brand for broadband connectivity, MVNOs can create personalized packages to deliver different data Quality of Service (QoS) and 5G services to meet customer requirements, which is anticipated to propel the growth of the market.

Australia Mobile Virtual Network Operator (MVNO) Industry Overview

The Australia Mobile Virtual Network Operator (MVNO) Market is fragmented with the presence of major players like Medion Australia Pty Ltd (Aldi Mobile), Amaysim Mobile Pty Ltd, Boost Tel Pty Limited, Dodo Services Pty Ltd, and Superloop Limited. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their solutions offerings and gain sustainable competitive advantage.

October 2023 - TPG Telecom announced the activation of its 5G standalone connectivity for iiNet, TPG, Internode, and Westnet customers to expand their network coverage with a larger customer base. According to a recent statement from the telecommunications company, customers will soon be able to enjoy better service, increased 5G speeds, and consistent performance.

August 2023 - Amaysim, an MVNO of the country, planned to add 5G to most of its mobile plans, enabling its users to access advanced mobile technology. The company was acquired by Optus, which helped it increase its market presence in the 5G telecom segment. Its existing customers can access the Optus 5G network included, at no extra charge, which shows the increased importance of MVNO and MNO collaborations and partnerships in the market, enabling the market vendors to offer competitive offerings to increase their market share in the Australian telecom market.

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