analysys mason

Developed Asia–Pacific telecoms market: trends and forecasts 2023–2028

Julia Martusewicz-Kulinska, Erik Ottosson, James McManus, Mubtasin Quader, Stephen Day, Jonathan Daniel

September 2023, based on data up to 1Q 2023

About this report

Analysys Mason provides detailed 5-year forecasts of the telecoms market in developed Asia–Pacific (DVAP).

This report focuses on operators' core telecoms services in developed Asia–Pacific. It includes discussion of 5G developments, value-added services (VAS), IoT, pay TV and operator business services. These services are discussed in detail in our other research programmes.

This report also includes metrics related to equipment revenue.

Our forecasts are informed by on-the-ground, regional market experts from our topic-led research programmes and our consulting division, as well as external interviews.

In addition to our robust set of historical data, our forecasts draw on a unique and in-house modelling tool, which applies a rigorous procedure (reconciling different sources, standard definitions, top-down and bottom-up modelling).

This report presents commentary on the data available at the time of writing. However, we constantly refine and refresh our data, so please visit the Analysys Mason DataHub to view the latest data associated with this report.

REPORT COVERAGE

Connections

Mobile

- Handset, mobile broadband,[1] IoT[2]
- Prepaid, contract
- 2G, 3G, 4G, 5G
- Smartphone, non-smartphone

Fixed

- Voice, broadband
- Narrowband voice, VoBB
- DSL, FTTP/B, cable, FWA, 5G, other

Pay TV

Traffic

- Outgoing voice minutes, MoU
- Mobile data traffic

Revenue/ARPU/ASPU

Mobile

- Service,[3] retail, wholesale
- Handset, mobile broadband,[1] IoT[2]
- Handset voice, messaging, data
- Prepaid, contract
- 2G, 3G, 4G, 5G

Fixed

- Service,[3] retail, wholesale
- Voice, broadband, dedicated connections
- DSL, FTTP/B, cable, FWA, 5G, other

ICT services

Pay TV

Value-added services

Equipment

This document is for Analysys Mason's customers only. Usage is subject to the terms and conditions in our copyright notice. [1] Includes USB modem, and mid- and large-screen, but not handset-based data. [2] IoT connections and revenue figures include mobile services only. [3] Service revenue is the sum of retail and wholesale revenue.

Contents

Executive summary

Regional forecasts and cross-country comparison

Individual country forecasts

Methodology

About the authors and Analysys Mason

About the authors

Julia Martusewicz-Kulinska (Principal Analyst) is a member of the Regional Markets research team and the lead analyst for the European Core Forecasts and European Country Reports research programmes. Julia also contributes to the Americas, Asia–Pacific, The Middle East and Africa and Telecoms Market Matrix research programmes. She has more than 18 years of research and telecoms industry regulations experience. Prior to joining Analysys Mason, she worked for the Qatar national regulatory authority and for Polish national regulatory authority as the head of the Research Division, and as the leader of the Telecommunications Market Analysis Department, which was accountable for co-operation between the regulatory authority and the Information Society and Media DG of the European Commission.

Erik Ottosson (Associate Consultant) is a member of Analysys Mason's consulting team in Stockholm, but he is currently on secondment with Analysys Mason's research team. He holds an MSc in industrial engineering and management from Lund University, where he specialised in finance and risk.

Stephen Day (Research Analyst) is a research analyst based in the London office. He attended Durham University, where he studied for a BSc in mathematics. He has a particular interest in data and statistical modelling and based his final-year university project on fitting models to Formula One data.

About the authors

James McManus (research analyst) is a member of Analysys Mason's research team in London. James was previously a Due Diligence Analyst at KYC Luxembourg. He also has extensive work experience from internships with organisations in New York, where he specialised in AVoIP solutions and helped to implement new CRM software and VoIP applications. He holds a BSc in Business Management from Queen's University Belfast.

Mubtasin Quader (Research Analyst) is a member of the Analysys Mason's research team in London. He holds an MSc in Corporate Finance from Bayes Business School and an MSc in Business Intelligence from University of Westminster.

Jonathan Daniel (Research Analyst) is based in the London office. He holds a degree in physics from St. Stephen's College, Delhi and a postgraduate degree in data and decision analytics from the University of Southampton. During his postgraduate studies, he undertook a project with University Hospital Bristol in which he modelled the recovery trajectory of paediatric patients suffering from acquired brain injury.

Our research services

Consumer Services

Fixed Broadband Services
Mobile Services
Fixed–Mobile Convergence
Smart Devices
Future Comms
Video, Gaming and Entertainment

Networks

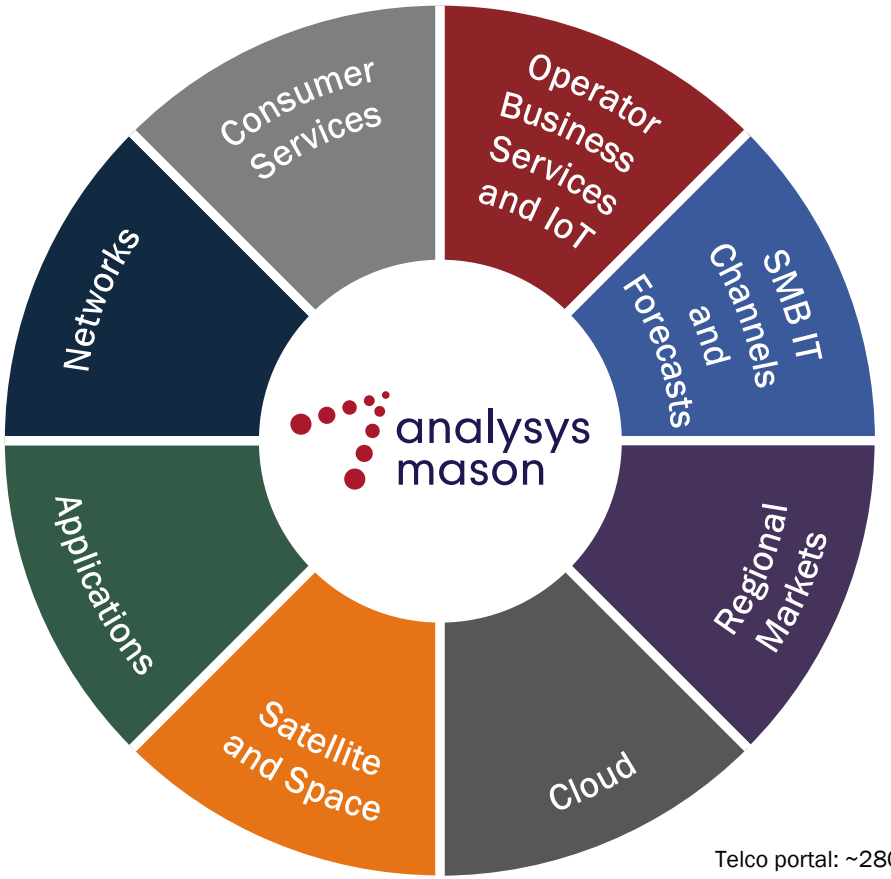
Next-Generation Wireless Networks
Wireless Infrastructure Strategies
Fibre Infrastructure Strategies
Operator Investment Strategies
Telecoms Strategy and Forecast
Transport Network Strategies

Applications

Network Automation and Orchestration
Customer Engagement
Monetisation Platforms
Digital Experience
Automated Assurance
Service Design and Orchestration
Telecoms Software Market Shares

Satellite and Space

Satellite Strategies for Telcos



Operator Business Services and IoT

Enterprise Services
SME Services
IoT Services
Private Networks
Cyber Security

SMB IT Channels and Forecasts

SMB Technology Forecaster

Regional Markets

Global Telecoms Data and Financial KPIs
Americas
Asia–Pacific
Middle East and Africa
European Core Forecasts
European Telecoms Market Matrix
European Country Reports

Cloud

Cloud Infrastructure Strategies
Data, AI and Development Platforms
Edge and Media Platforms
Multi-Cloud Networking

DataHub

Forecast data for 80 countries
Telco portal: ~2800 forecast and ~320 historical metrics
SMB Technology Forecaster portal: ~120 000 forecast metrics

analysysmason.com/what-we-do/practices/research

PUBLISHED BY ANALYSYS MASON LIMITED IN **OCTOBER 2023**

Analysys Mason Limited. Registered in England and Wales with company number 05177472. Registered office: North West Wing Bush House, Aldwych, London, England, WC2B 4PJ.

We have used reasonable care and skill to prepare this publication and are not responsible for any errors or omissions, or for the results obtained from the use of this publication. The opinions expressed are those of the authors only. All information is provided "as is", with no guarantee of completeness or accuracy, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose. In no event will we be liable to you or any third party for any decision made or action taken in reliance on the information, including but not limited to investment decisions, or for any loss (including consequential, special or similar losses), even if advised of the possibility of such losses.

We reserve the rights to all intellectual property in this publication. This publication, or any part of it, may not be reproduced, redistributed or republished without our prior written consent, nor may any reference be made to Analysys Mason in a regulatory statement or prospectus on the basis of this publication without our prior written consent.

© Analysys Mason Limited and/or its group companies 2023.