

Developed Asia–Pacific telecoms market: trends and forecasts 2019–2024



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About this report

This report provides:

- a 5-year forecast of more than 180 mobile and fixed KPIs for DVAP, as a whole and for seven key countries
- an in-depth analysis of the trends, drivers and forecast assumptions for each type of mobile and fixed service, and for key countries
- an overview of operator strategies and country-specific topics, in order to highlight similarities and differences by means of a cross-country comparison
- a summary of results, key implications and recommendations for mobile and fixed operators.

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 methodology (reconciliation of different sources, standard definitions, top-down and bottom-up modelling).



Our forecasts are refined throughout the year. This report presents the results at the time of publication and will continue to give useful background information about key drivers. However, we recommend that you always use the Analysys Mason [DataHub](#) to view the latest data associated with this report.

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.

REPORT COVERAGE		
Geographical	Key performance indicators	
Regions modelled ▪ Developed Asia-Pacific (DVAP) Countries modelled individually ▪ Australia ▪ Hong Kong ▪ Japan ▪ New Zealand ▪ Singapore ▪ South Korea ▪ Taiwan	Connections	Revenue
	Mobile	Mobile
	▪ Handset, mobile broadband¹, IoT² ▪ Prepaid, contract ▪ 2G, 3G, 4G, 5G ▪ Smartphone, non-smartphone	▪ Service³, retail ▪ Prepaid, contract ▪ Handset, mobile broadband¹, IoT² ▪ Handset voice, messaging, data
	Fixed	Fixed
	▪ Voice, broadband, IPTV, dial-up ▪ Narrowband voice, VoBB ▪ DSL, FTTP/B, cable, BFWA, 5G, other	▪ Service³, retail ▪ Voice, broadband, IPTV, dial-up, specialist business services ▪ DSL, FTTP/B, cable, BFWA, other
		ARPU
	Voice traffic	Mobile:
	Fixed and mobile	▪ SIMs, handset ▪ Prepaid, contract ▪ Handset voice, data
	▪ Outgoing minutes, MoU	

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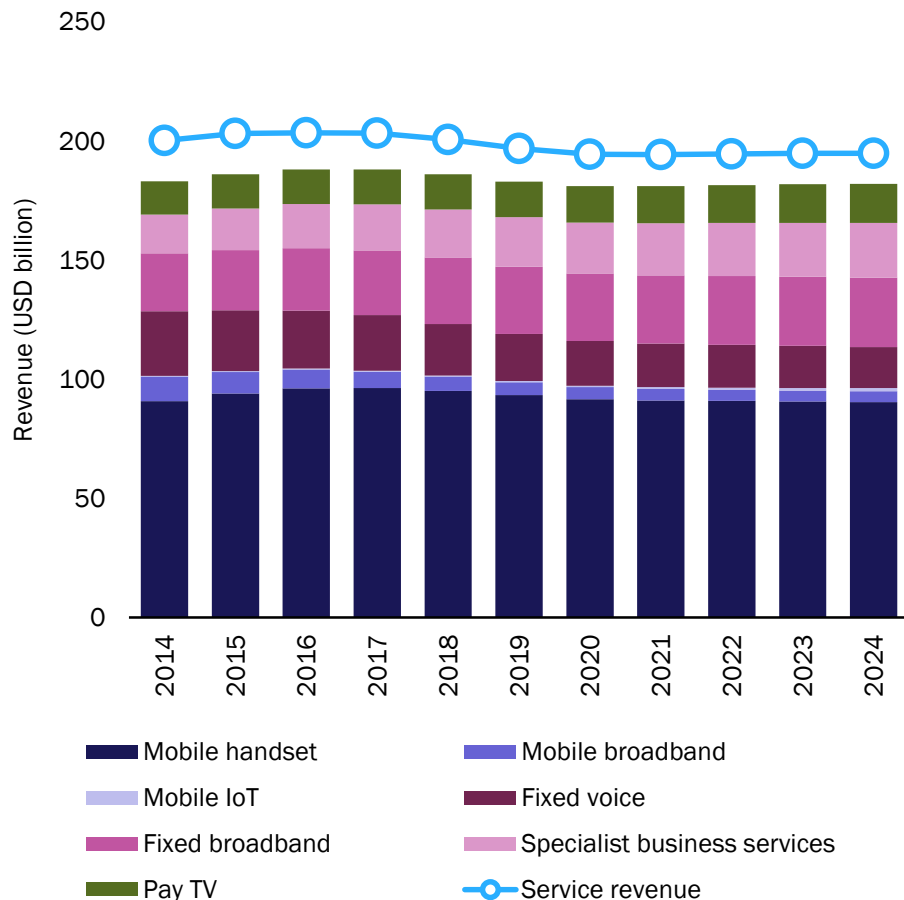
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High levels of competition and market saturation will limit the telecoms revenue growth during the forecast period

Figure 1: Telecoms and pay-TV retail revenue by type and total service revenue, developed Asia-Pacific, 2014–2024



Source: Analysys Mason

The total telecoms service revenue in developed Asia-Pacific (DVAP) will decline slightly, mainly due to competitive pressure.

The fast pace of technological development, the continuous demand for speed upgrades and a high GDP per capita will help telecoms operators in DVAP to (at least partially) offset the effects of high competitive pressure and market saturation.

Fixed broadband, pay-TV and specialist business services will contribute most to telecoms fixed revenue growth. Operators will be able to monetise their investments in the deployment and upgrade of NGA infrastructure by upselling enhanced broadband access speeds to respond to the constant demand for new, band-consuming technologies, such as ultra-high definition (UHD) video and virtual reality (VR). Specialist business services will contribute most to fixed revenue growth, accounting for 27% of fixed revenue (including Pay TV) by 2024. Operators in DVAP are well prepared to answer the demand for advanced business solutions, especially for large enterprises, due to their nationwide network coverage, regulatory expertise and technological advancement.

The rapid adoption of 5G will limit ASPU decline, and operators will encourage the take-up of premium 5G offers through the value-added services that can be bundled with data plans, but there is little room for price increases. In addition, increasing competition (particularly among new MNOs in Singapore and Japan), as well as regulatory measures aimed at driving price reductions (as in Japan), will contribute to a further decline in mobile revenue.

Geographical coverage: the number of NGA connections in Australia and New Zealand will grow towards that in the rest of the region during the forecast period

Figure 3: 4G/5G share of mobile connections and NGA share of fixed broadband connections by country, developed Asia-Pacific, 2018 and 2024¹



¹ For a full list of countries modelled as part of the developed Asia-Pacific region, please see the accompanying data annex. Mobile connections exclude IoT connections. NGA share of fixed broadband connections is calculated as cable, VDSL and FTTP/B connections (that provide access speeds of 30Mbps or more) divided by the total number of fixed broadband connections.



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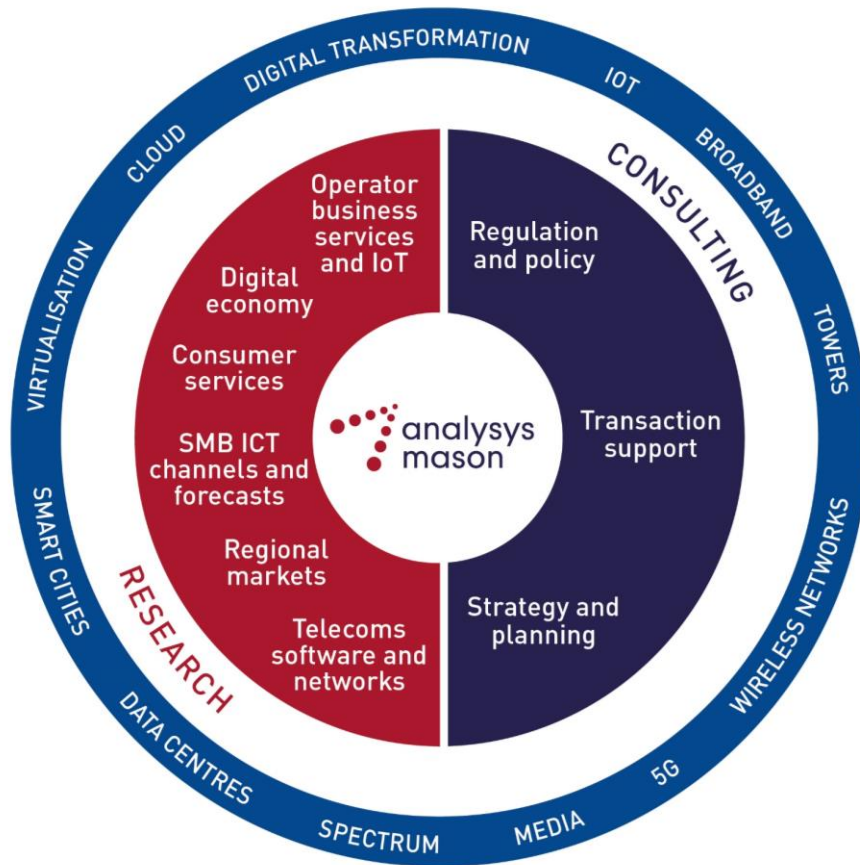
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