



# Mobile services in developed Asia-Pacific: trends and forecasts 2019-2024



Andrew Yi-Ju Chern, Alex Boisot and Stephen Wilson



# About this report


This report provides commentary and trend analysis to support our 5-year forecast for developed Asia-Pacific. It includes worldwide context and commentary on seven key countries: Australia, Hong Kong, Japan, New Zealand, Singapore, South Korea and Taiwan.

Our forecasts are based on our robust set of historical data and draw on a unique and in-house modelling tool that applies a rigorous methodology (reconciliation of different sources, standard definitions, top-down and bottom-up modelling).

For the complete data set for the region, please see Analysys Mason's DataHub at [www.analysysmason.com/DataHub](http://www.analysysmason.com/DataHub).

## WHO SHOULD READ THIS REPORT

- Market intelligence, strategy and project managers at mobile operators in developed Asia-Pacific.
- Regulatory bodies in developed Asia-Pacific.
- Financial institutions that directly invest in the telecoms sector in the region, or advise others that do so.
- Press and media bodies that need a foundation of knowledge of the mobile telecoms market in developed Asia-Pacific.



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](http://www.analysysmason.com/DataHub) to view the latest data associated with this report.

GEOGRAPHICAL COVERAGE	KEY METRICS
<div><b>Regions modelled</b><ul style="list-style-type: none"><li>▪ Developed Asia-Pacific (DVAP)</li></ul></div> <div><b>Countries modelled individually</b><ul style="list-style-type: none"><li>▪ Australia</li><li>▪ Hong Kong</li><li>▪ Japan</li><li>▪ New Zealand</li><li>▪ Singapore</li><li>▪ South Korea</li><li>▪ Taiwan</li></ul></div>	<div><b>Connections</b><ul style="list-style-type: none"><li>▪ Handset, mobile broadband, IoT</li><li>▪ Prepaid, contract</li><li>▪ 2G, 3G, 4G, 5G</li><li>▪ Smartphone, non-smartphone</li></ul></div> <div><b>Revenue</b><ul style="list-style-type: none"><li>▪ Service, retail</li><li>▪ Prepaid, contract</li><li>▪ Handset, mobile broadband, IoT</li><li>▪ Handset voice, messaging, data</li></ul></div> <div><b>ARPU</b><ul style="list-style-type: none"><li>▪ SIMs, handset</li><li>▪ Prepaid, contract</li><li>▪ Handset voice, data</li></ul></div>

# Contents

## 5. Executive summary

### 6. Executive summary

## 7. Worldwide trends

8. Worldwide: mobile data demand will drive telecoms revenue growth in most regions; mobile revenue will only decline in DVAP during the forecast period

## 9. Regional trends

10. Mobile IoT will be the only area of growth in terms of revenue and the number of connections
11. The take-up of 5G services in DVAP will be rapid thanks to favourable demand-side conditions
12. ARPU will gradually stabilise during the forecast period
13. Commercial 5G launches and the ongoing expansion of 5G networks will be the main focus areas for operators

## 14. Country-level trends

15. Australia: mobile handset revenue will grow, driven by increased smartphone adoption and data consumption
16. Hong Kong: competition in the value segment will intensify; incumbent operators will respond by increasing tariffs for premium customers
17. Japan: market competition will increase after the entrance of the new MNO
18. New Zealand: mobile customers will continue to migrate from prepaid to postpaid plans
19. Singapore: the mobile market has been strongly affected by the entry of a fourth MNO

20. South Korea: the launch of 5G mobile plans will help to reduce price pressure

21. Taiwan: MNOs will struggle to monetise the rapid increase in data consumption

## 22. Forecast methodology and assumptions

23. Our forecast model is supported by sound market knowledge
24. Examples of forecast input drivers

## 25. About the authors and Analysys Mason

26. About the authors
27. Analysys Mason's consulting and research are uniquely positioned
28. Research from Analysys Mason
29. Consulting from Analysys Mason

## List of figures

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

Figure 2: Mobile service revenue by location, developed Asia-Pacific and worldwide, 2014–2024

Figure 3: Telecoms retail revenue by mobile service type, and mobile ARPU, developed Asia-Pacific, 2014–2024

Figure 4: Telecoms retail revenue and growth rate by service type, developed Asia-Pacific, 2014–2024

Figure 5: Mobile connections by type, developed Asia-Pacific (million), 2014–2024

Figure 6: Mobile connections by generation, developed Asia-Pacific (million), 2014–2024

Figure 7: Mobile ARPU by type, developed Asia-Pacific (USD per month), 2014–2024

Figure 8: Contract share of mobile connections (excluding IoT), developed Asia-Pacific, 2014–2024

Figure 9: Mobile data traffic per connection, developed Asia-Pacific (MB per month), 2014–2024

Figure 10: Mobile penetration by country, developed Asia-Pacific, 2014–2024

Figure 11: Mobile ARPU by country, developed Asia-Pacific, 2014–2024

Figure 12: Mobile ARPU, Australia (AUD per month), 2014–2024

Figure 13: Mobile connections by type, Australia (million), 2014–2024

Figure 14: Mobile ARPU, Hong Kong (HKD per month), 2014–2024

Figure 15: Mobile connections by type, Hong Kong (million), 2014–2024

Figure 16: Mobile ARPU, Japan (JPY per month), 2014–2024

Figure 17: Mobile connections by type, Japan (million), 2014–2024

Figure 18: Mobile ARPU, New Zealand (NZD per month), 2014–2024

Figure 19: Mobile connections by type, New Zealand (million), 2014–2024

Figure 20: Mobile ARPU, Singapore (SGD per month), 2014–2024

Figure 21: Mobile connections by type, Singapore (million), 2014–2024

Figure 22: Mobile ARPU, South Korea (SKW per month), 2014–2024

Figure 23: Mobile connections by type, South Korea (million), 2014–2024

Figure 24: Mobile ARPU, Taiwan (TWD per month), 2014–2024

Figure 25: Mobile connections by type, Taiwan (million), 2014–2024

## Executive summary

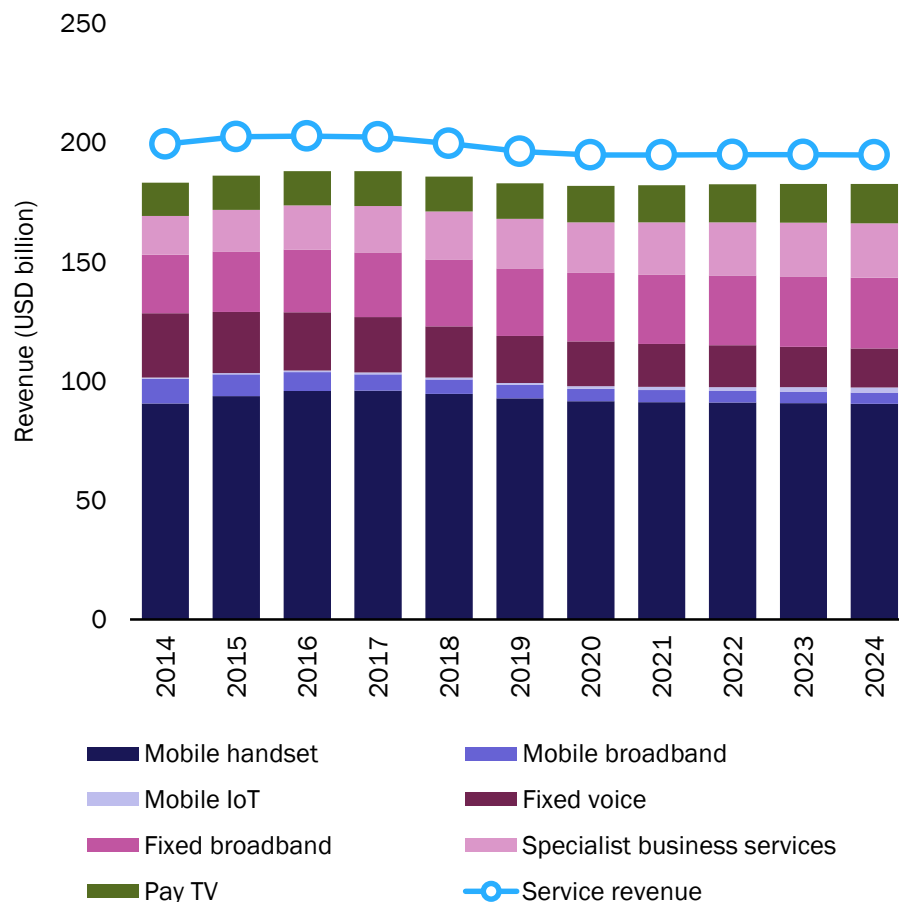
**The total telecoms service revenue in developed Asia-Pacific (DVAP) will decline very slightly during the forecast period.**

Countries in DVAP typically have some of the most technologically advanced and mature telecoms markets in the world. High levels of competition among operators and market saturation will continue to limit the scope for telecoms revenue growth in DVAP.

Operators are continuing to focus on increasing network speeds, but will face diminishing returns to increasing data allowances and transfer speeds as consumers' appetite for data becomes increasingly sated. Mobile data revenue has successfully offset declining revenue from legacy services for much of the past decade, but this will become increasingly difficult. In Japan, which accounts for over half of the region in terms of revenue, increased competition in the mobile segment following the entry of a new challenger MNO will have a significant impact on the ability of MNOs to monetise data.

A robust macroeconomic outlook in the majority of countries in the region, along with several notable technological developments, will mitigate the extent of revenue declines, despite the poor prognosis. Revenue from legacy services will continue to gradually stabilise after a period of prolonged decline following the advent of OTT alternatives.

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

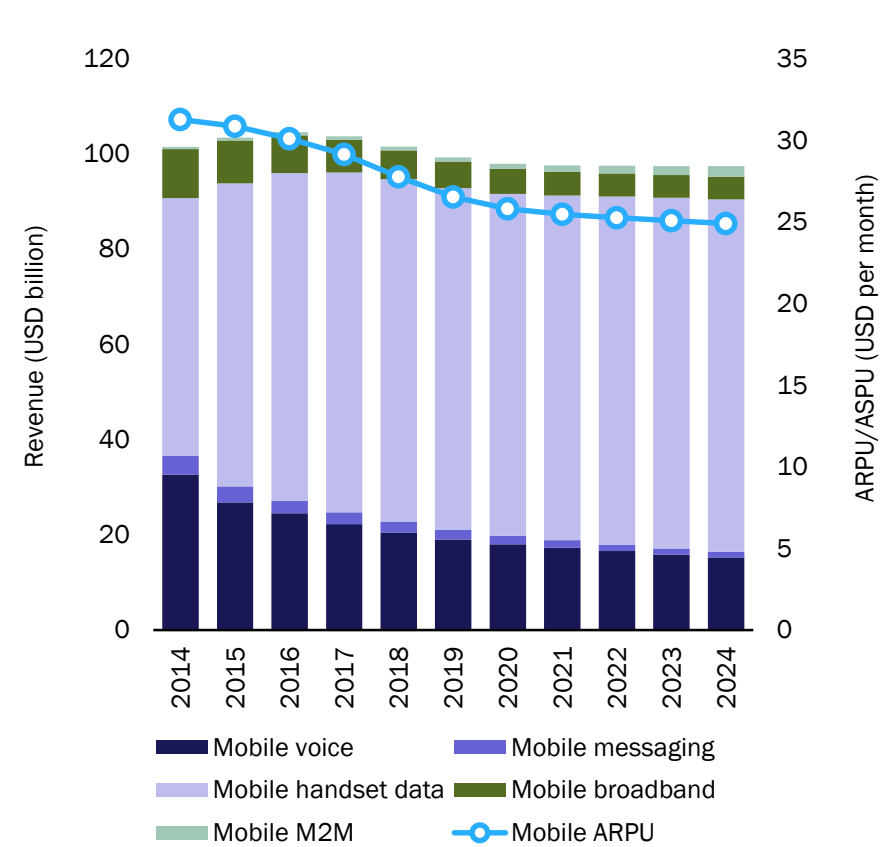


Source: Analysys Mason

<sup>1</sup> This includes revenue from traditional pay-TV services only, and excludes that from OTT services.

# Mobile IoT will be the only area of growth in terms of revenue and the number of connections

Figure 3: Telecoms retail revenue by mobile service type, and mobile ARPU, developed Asia-Pacific, 2014-2024

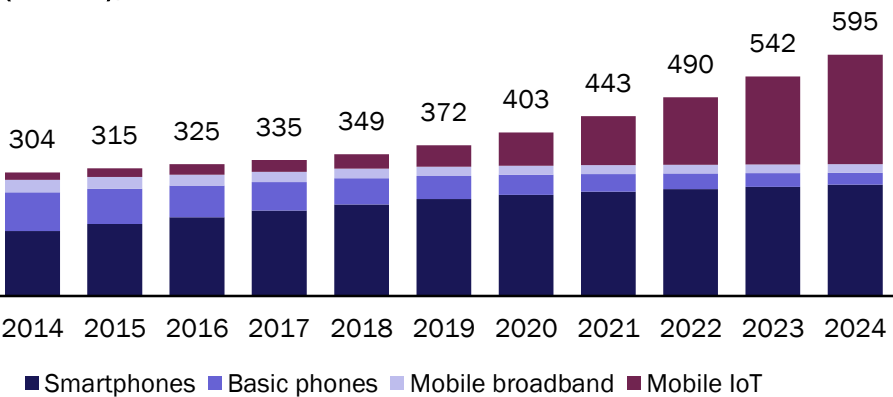


Source: Analysys Mason

Figure 4: Telecoms retail revenue and growth rate by service type, developed Asia-Pacific, 2014-2024

Service type	Retail revenue (USD billion)		CAGR	
	2018	2024	2014-2018	2018-2024
Mobile handset	94.7	90.5	1.1%	-0.8%
Mobile broadband	6.04	4.71	-12.4%	-4.1%
Mobile IoT	0.78	2.23	11.8%	19.2%

Figure 5: Mobile connections by type, developed Asia-Pacific (million), 2014-2024



Source: Analysys Mason



## Contents



Executive summary

Worldwide trends

Regional trends

Country-level trends

Australia

Hong Kong

Japan

New Zealand

Singapore

South Korea

Taiwan

Forecast methodology and assumptions

**About the authors and Analysys Mason**

## About the authors



**Andrew Yi-Ju Chern** (Research Analyst) is a member of the regional markets research team in London, contributing mainly to the *Telecoms Market Matrix*, *Asia-Pacific* and *Global Telecoms Data* research programmes. Prior to joining Analysys Mason, Andrew was a business analyst at Vodafone. Andrew holds a BSc in Economics and Finance from Tsinghua University and a MSc in Strategic Management from HEC Paris.



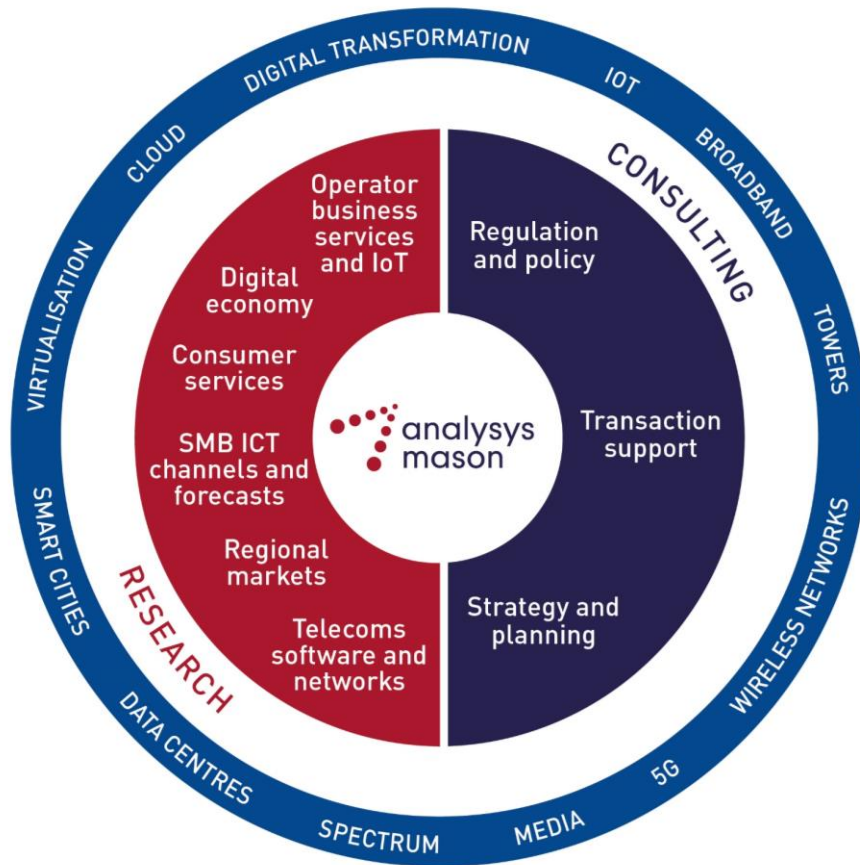
**Alex Boisot** (Research Analyst) is a member of the regional markets research team in London, contributing primarily to the *Telecoms Market Matrix* and *European Country Reports* research programmes. Alex holds a BA in Philosophy, Politics and Economics from the University of East Anglia. He conducted research on the impact of telecommunications technologies on modern societies during his studies, writing his dissertation on e-government and e-democracy. He has also worked on the development of a mobile game aiming to teach users the basic principles of physics.



**Stephen Wilson** (Principal Analyst) is the lead analyst for Analysys Mason's *Fixed Broadband Services* research programme. He leads Analysys Mason's annual FTTx coverage, capex and conversion forecasts, and other recent areas of focus include examining fixed broadband operators' home Wi-Fi strategies. Stephen has more than 10 years of experience in the telecoms sector and is a graduate in Philosophy, Politics and Economics from St Catherine's College, Oxford University.

# Analysys Mason's consulting and research are uniquely positioned

## Analysys Mason's consulting services and research portfolio



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Digital Economy Strategies  
Future Comms

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Large Enterprise Emerging Service Opportunities  
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