

## **Australia Telecom MNO - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

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### **Report description:**

Australia Telecom MNO Market Analysis

The Australia Telecom MNO Market is expected to grow from USD 23.42 billion in 2025 to USD 24.35 billion in 2026 and is forecast to reach USD 29.56 billion by 2031 at 3.96% CAGR over 2026-2031. In terms of subscriber volume, the market is expected to grow from 34.65million subscribers in 2025 to 41.42million subscribers by 2030, at a CAGR of 3.63% during the forecast period (2025-2030). In terms of subscriber volume, the market is expected to grow from 34.65million subscribers in 2025 to 41.42million subscribers by 2030, at a CAGR of 3.63% during the forecast period (2025-2030). This outlook reflects a resilient growth trajectory powered by nationwide 5G coverage gains, fiber-to-the-premises (FTTP) upgrades, and rising enterprise demand for managed ICT and cloud connectivity. At present, data services secure the largest revenue share of 47% while voice services retain 25%, underscoring the structural shift toward bandwidth-intensive applications. Competitive intensity continues to rise as TPG finalizes network-sharing with Optus, Vocus absorbs TPG's fixed assets, and Telstra invests USD 800 million in AI-enabled network automation. Meanwhile, daily mobile traffic has climbed to 9 million GB and average monthly usage is projected to double to 28.7 GB by 2028, sustaining capacity monetization opportunities even as higher NBN wholesale charges and retail price increases squeeze household budgets.

Australia Telecom MNO Market Trends and Insights

5G Coverage Expansion Driving Premium Service Monetization

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Australia's 5G rollout has passed the early-adopter phase and is now the primary engine of revenue uplift. Telstra reaches 91% population coverage and Optus exceeds 80%, underpinned by a USD 800 million multiyear capex plan that embeds Ericsson's AI-based network management to unlock differentiated speed tiers. Customers migrating to premium 5G plans lifted mobile service revenue 3.7% year-over-year in 2024, counterbalancing price fatigue in lower tiers. Enterprise interest is likewise robust: Newmont's Cadia mine reported 80% improvement in underground communications after pilot 5G deployment, validating advanced use cases in autonomous haulage. Spectrum availability in the 26 GHz and 28 GHz bands, allocated under ACMA's apparatus licensing framework, further accelerates metropolitan small-cell densification.

#### FTTP Network Upgrades Accelerating ARPU Recovery

The federal government's USD 3 billion infusion and NBN Co's USD 800 million co-investment will upgrade 622,000 premises to gigabit capability by 2030, lifting the share of ultrafast connections to 94% of households. Average household data consumption has risen ten-fold in the past decade, and gigabit tiers position service providers to reclaim ARPU lost to discount plans. NBN Co projects a USD 10.4 billion GDP contribution from productivity gains linked to FTTP, yet annual wholesale increases aligned to CPI-4.1% for FY25-continue to squeeze retailer margins. Operators are mitigating cost pressure by nudging customers to NBN 100 and NBN 250 plans, where usage-based overage fees and bundling create incremental margin headroom.

#### NBN Wholesale Cost Pressures Constraining Operator Margins

Retail providers face widening cost-revenue gaps because NBN Co's wholesale pricing has increased 4.1% annually, with higher-speed tiers absorbing the largest absolute jumps. The ACCC flagged NBN's proposed special access undertaking as a "potential price shock," adding oversight risk should indexation outpace CPI. Telstra warns that 25% of copper disconnections have not migrated to NBN due to affordability issues and argues that sustained wholesale rises threaten broadband penetration targets. Retailers increasingly upsell higher speed tiers and bundle entertainment to buffer gross margins, but headroom is limited as households tighten discretionary spend amid cost-of-living pressures.

Other drivers and restraints analyzed in the detailed report include:

Enterprise ICT Demand Fueling Managed Services Growth  
Mobile Data Surge from Streaming and Gaming Applications  
Price Competition Intensifying Across Mobile Services

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Data services generated USD 10.9 billion in 2025, equating to 46.55% of Australian telecom MNO market share and growing at 3.99% CAGR through 2031. The rise of OTT video, cloud gaming, and enterprise VPN traffic positions data revenues to exceed USD 13.8 billion by the end of the period, sustaining their dominance within the Australian telecom MNO market. Voice services delivered USD 5.81 billion and hold 24.80% share but trail other categories with 3.74% CAGR as users pivot to over-the-top calling. IoT and M2M services contributed USD 1.87 billion, supported by projections that cellular IoT connections will climb to 6.4 billion globally by 2029. OTT and PayTV fetched USD 2.59 billion, while value-added and roaming services collectively accounted for USD 2.25 billion.

Data traffic grew threefold in five years, and average monthly consumption is poised to double through 2028, confirming the structural shift in user behavior. SVOD revenue expanded 14% year-over-year to USD 2.7 billion as subscription counts neared 50 million, explaining why data ARPU growth outstrips voice. ACMA performance codes now require carriers to publish peak-time packet-loss metrics, raising service-quality benchmarks that favor providers with dense backhaul and caching resources.

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The Australia Telecom MNO Market is Segmented by Service Type (Voice Services, Data and Internet Services, Messaging Services, IoT and M2M Services, OTT and PayTV Services, and Other Services), and End User (Enterprises, Consumer). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Subscribers).

List of Companies Covered in this Report:

Telstra Optus TPG Telecom (Vodafone)

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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