Australia - Mobile Broadband - Statistics, LTE and 5G

Description: The three LTE networks operated by Optus, Telstra and Vodafone have developed rapidly during the past two years as these players strive to provide an infrastructure capable of meetings customer demand for mobile broadband services. Telstra continues to be a global leader in mobile services, being a partner with Ericsson in developing 5G. The two companies have demonstrated 1Gb/s capabilities over a commercial LTE network using carrier aggregation technology, and will use the 2018 Commonwealth Games in Queensland to trial a range of technologies including a prototype 5G.

Increasingly in an era leaning further to mobile data than voice, mobile networks must offer sufficient performance for customers. These developments have propelled Australia in global league tables, with the country having recorded the fastest peak mobile broadband speeds globally. Australia topped the 2016 GSMA league table for mobile connectivity, and continues to be at the forefront in developing technologies such as LTE-Broadcast.

Optus and Telstra have been able to utilise their 700MHz spectrum assets, while Vodafone in mid-2016 made a bid to secure a remaining block in the band. All three now provide about 98% population coverage. The auction of unused spectrum in the 1800MHz band in 2016 further improve the ability of MNVOs to extend their LTE services, while proposals by the ACMA to release spectrum in a range of bands through to 2024 anticipates progress with 5G, M2M and the Internet of Things. As a result of these developments the mobile market has seen a steady migration of subscribers from 3G to LTE. Telstra in December 2016 closed down its 2G infrastructure, while both Optus and Vodafone will have done so by September 2017. This will release spectrum and physical assets to be repurposed for LTE.

Progress by Australia's mobile operators, together with high consumer demand, has meant that the country now has one of the highest proportions in the world of LTE subscribers to overall mobile subscribers.

The use of mobile broadband in Australia has expanded rapidly in recent quarters in line with the expansion of LTE networks, which by the end of 2016 are expected to provide about 98% population coverage. As of 2016 there were about 6.04 million mobile broadband subscribers in Australia, a growing proportion of them on the LTE networks of Telstra, Optus and Vodafone. These MNOs have invested in spectrum and network upgrades to bolster network capacity, while the geographic extension of LTE will see wider take-up from consumers in coming years. Given that about 90% of all mobile device sales are now smartphones, the growth in mobile data traffic is increasing rapidly.

In addition to mobile broadband, Wi-Fi has seen a resurgence as players respond to customer demand for connectivity. Telstra has rekindled its Wi-Fi ambitions, launching Air Wi-Fi. Through its partnership with Fon, Telstra customers can have access to about two million hotspots nationally and about 15 million globally.

This report provides an overview of the mobile broadband market in Australia, including updated statistics, industry estimates and forecasts, and analyses of key market trends. It also provides data and analysis on a range of mobile technologies in Australia, as well as an assessment of network developments. It also assesses the prospects for operators as they extend their LTE deployments beyond the major urban areas and deeper into rural areas. The report contains a range of valuable key statistics on network data throughput, operator strategies and emerging technologies.

Key Developments:

Telstra closes down its 2G network; Lycamobile providing LTE services through Telstra Wholesale; 1800MHz auction in February 2016 boosts LTE availability in rural areas; Australia rated with the highest mobile broadband speed globally; Comms Alliance calls for flexibility in spectrum management; Kogan Mobile providing LTE on Vodafone's network; Telstra and Ericsson to use Commonwealth Games to trial 5G; Telstra launches five-band carrier aggregation; Google's Project Loon teams up with Telstra for LTE; mobile data traffic expected to grow six-fold to 2018; Vodafone re-allocates existing 850MHz spectrum for LTE; MNOs providing VoLTE services; LTE population coverage approaching 98%; government encourages public engagement through mobile platform; report includes recent market developments.

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