



COMMERCE  
COMMISSION  
NEW ZEALAND  
*Te Komihana Tauhokohoko*

# 2022 Annual Monitoring Report | Digital connectivity

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A discussion

July 2023



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## At this workshop

Share the findings and development of this report, seek your observations and feedback.



**15 minutes: Insights from 2022**  
Ben Oakley  
Telecommunications Manager



**15 minutes: Development of the report**  
Brendan Dempsey  
Principal Adviser



**40 minutes: General discussion**  
All





## Rural connectivity

- ① Copper now makes up less than 50% of rural broadband connections
- ② Major RSPs are not offering copper to new customers
- ③ Copper retail pricing is most variable with a \$32 per month range
- ④ Large increase (521%) in satellite connections  
Satellite showing significantly faster download speeds than copper or fixed wireless



## Urban connectivity

- 1 Fastest growing broadband segment is electricity bundles (up 16%)
- 2 Urban broadband performance is good but focus needs to be on in-home performance
- 3 41% of broadband consumers haven't switched providers for 5 years+

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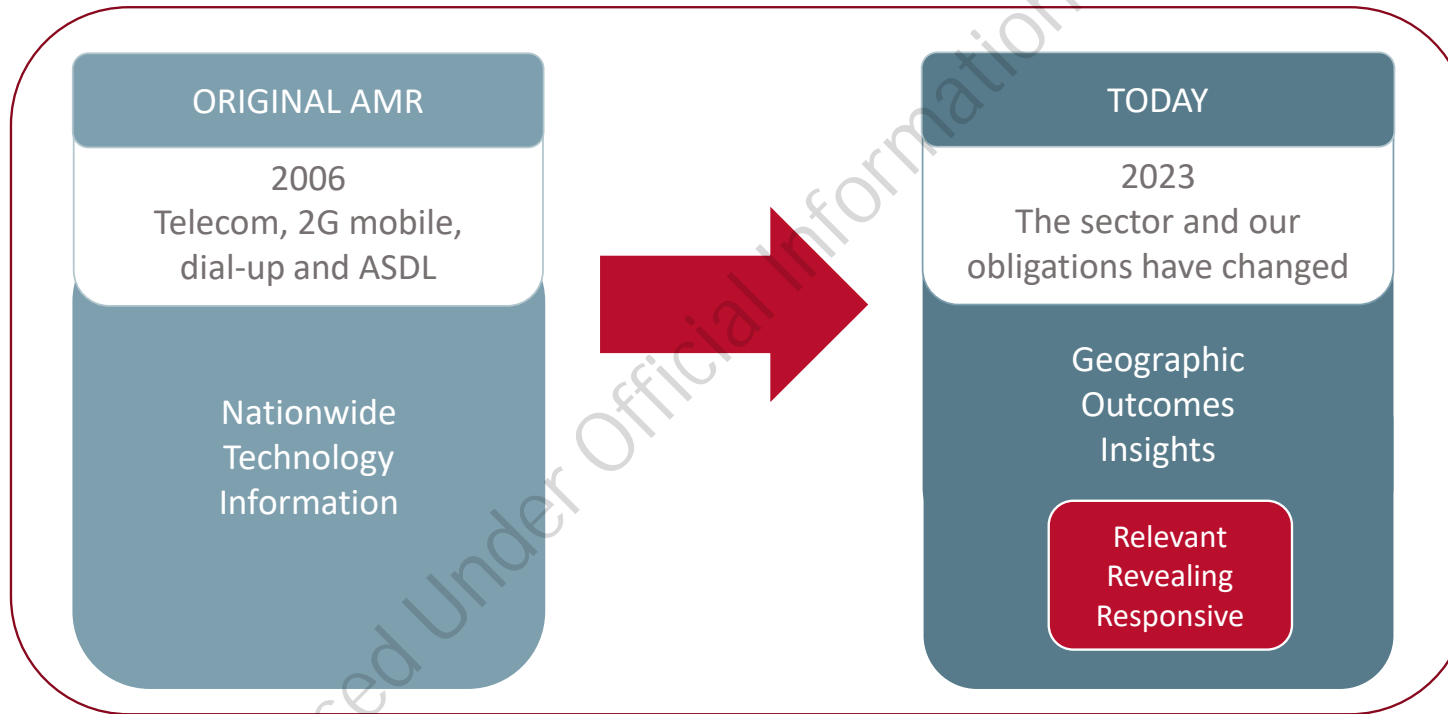
## INSIGHTS



### Mobile connectivity

- 1 58% of customers haven't switched in 5 years
- 2 Trend away from pre-paid to post-paid
- 3 Post-paid is almost twice pre-paid for average use
- 4 Price for average use appears to be increasing for both

# Telling the telecommunications story more effectively



## From information to insights

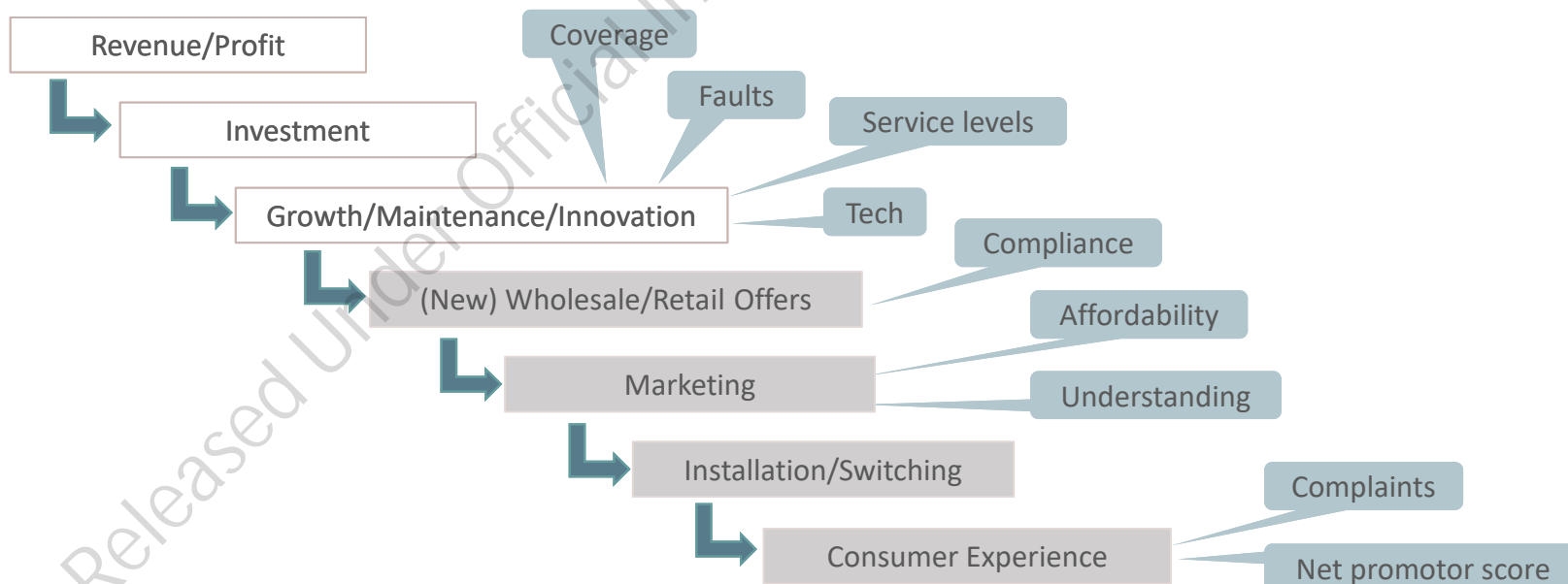
### INSIGHTS FOCUS

We need to understand and share how the sector is functioning end-to-end, and to answer basic policy questions.



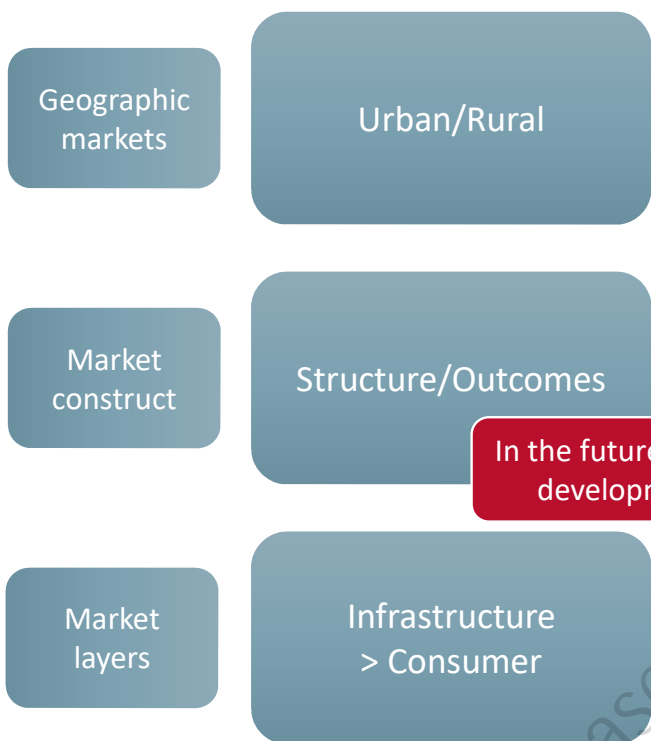
Joining the dots

### EXAMPLE Revenue/Profit



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## A new structure for the report



<b>Urban Connectivity At Home</b> Honotanga ā-tāone i rō kāinga	<b>13</b>	<b>Rural Connectivity At Home</b> Honotanga ā-tuawhenua i rō kāinga	<b>66</b>	<b>Connectivity On The Move</b> Honotanga hāereereea	<b>109</b>
<b>Market Structure</b>	<b>14</b>	<b>Market Structure</b>	<b>67</b>	<b>Market Structure</b>	<b>110</b>
Infrastructure	14	Infrastructure	67	Infrastructure	110
Wholesale	24	Wholesale	79	Wholesale	116
Retail	29	Retail	82	Retail	119
Consumer	37	Consumer	87	Consumer	124
<b>Market Outcomes</b>	<b>40</b>	<b>Market Outcomes</b>	<b>89</b>	<b>Market Outcomes</b>	<b>128</b>
Infrastructure	40	Infrastructure	89	Infrastructure	128
Wholesale	52	Wholesale	99	Wholesale	133
Retail	55	Retail	100	Retail	135
Consumer	63	Consumer	104	Consumer	139
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# Ngā mihi

