Global Mobile Connections Forecast, 2014 – 2019: *Far more connected devices than people*

Market Study
First Quarter 2015

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Abstract

Mobile subscribers worldwide increasingly depend on a variety of mobile devices to stay connected. One mobile subscriber can use many mobile connections, as is evidenced by many countries' current mobile penetration rates of more than 100 per cent. In addition to a mobile phone or smartphone, a subscriber can connect through a tablet, a mobile hotspot, a portable modem or, increasingly, an embedded modem in a connected car. Furthermore, additional mobile connections are also being generated by the Internet of Things (IoT). By looking at the world's mobile connections, we can see which regions currently produce the most connections and which will see the largest growth over the next five years.

The worldwide population is expected to continue its steady growth over the next five years from its current 7.2 billion people. Worldwide wireless connections are also growing from 6.9 billion connections in 2014 to reach almost 9.5 billion in 2019. Due to the proliferation of mobile devices, including mobile phones, tablets and connected cars, the global wireless penetration rate will rise from 96.4 percent in 2014 to 125 percent in 2019.

This global forecast shows how people the world over are increasingly using mobile devices as their main voice and data communications tool. In some regions, a smartphone may be the user's only connection to the Internet, while in other more developed regions individual subscribers use several mobile devices.

Aside from the increase in the number of connections, the other major change over the forecast period is the shift from 2G to 3G to 4G. For example, in 2014, 2G connections comprised half of all mobile connections. As these 2G connections decline over the next five years, 3G connections will become predominant. Fourth generation technologies, primarily LTE, will also see rapid growth globally, increasing from just six percent of all connections in 2014.

Key questions addressed:

- How many wireless connections are there globally and in each major geographic region?
- What is the split of those connections by technology type – both air interface and generation?
- What are some of the key connection-related trends by technology, including GSM, CDMA, UMTS/HSPA, and LTE, for the world and for each region?

- What are the major markets for LTE both today and throughout the forecast period?
- When does *iG*R expect LTE to become a significant portion of the various regions over the forecast period?

Who should read this report?

- Mobile operators
- Device OEMs
- Mobile infrastructure and equipment OEMs
- Content providers and distributors
- Financial analysts and investors.