

Europe Wireless Statistics Forecast, 2014 – 2019

Market Study
First Quarter 2015





Europe Wireless Statistics Forecast, 2014 – 2019

A Market Study

Published First Quarter, 2015
Version 1.0
Report Number: 1Q2015-10

iGR
12400 W. Hwy 71
Suite 350 PMB 341
Austin TX 78738

Table of Contents

Abstract.....	1
Executive Summary	3
Figure A: Europe Connections and Population, 2014-2019 (000).....	3
Figure B: Europe Mobile Handset Sales by Handset Type, 2014-2019 (units).....	4
Figure C: Europe Mobile Data Usage (MB) per Month per subscriber and connection, 2014-2019.....	5
Methodology	6
Europe Mobile Connections Forecast, 2014-2019	7
Table 1: Europe Connections, Population, and Penetration, 2014-2019	8
Figure 1: Europe Connections and Population, 2014-2019 (000).....	8
Table 2: Europe Connections by Technology Generation, 2014-2019 (000)	9
Figure 2: Europe Connections by Technology Generation, 2014-2019 (000)	9
Table 3: Europe Connections by Technology, 2014-2019 (000)	10
Figure 3: Europe Connections by Technology, 2014-2019 (000)	10
Europe Smartphone Sales Forecast, 2014-2019	11
Smartphone Sales Forecast Assumptions	11
Europe Handset Forecast by Type	12
Table 4: Europe Mobile Handset Sales by Handset Type, 2014-2019	12
Figure 4: Europe Mobile Handset Sales by Handset Type, 2014-2019 (units).....	13
Europe Smartphone Sales Forecast by Operating System.....	13
Table 5: Europe Mobile OS Sales Forecast, 2014-2019 (units)	14
Figure 5: Europe Mobile OS Sales Forecast, 2014-2019 (units)	14
Table 6: Europe Mobile OS Sales Forecast, 2014-2019 (Percentage Share)	15
Figure 6: Europe Mobile OS Sales Forecast, 2014-2019 (Percentage Share).....	15
Europe Tablet Sales Forecast, 2014-2019	16
Tablet Sales Forecast Assumptions	16
Europe Tablet Sales	19
Table 7: Europe Tablet Sales, 2014-2019 (units)	19
Figure 7: Europe Tablet Sales, 2014-2019 (units)	19
Europe Tablet Sales by Operating System	19
Table 8: Europe Tablet Sales by OS, 2014-2019 (units)	20
Figure 8: Europe Tablet Sales by OS, 2014-2019 (units)	20
Table 9: Europe Tablet OS Sales Forecast, 2014-2019 (Percentage Share)	21
Figure 9: Europe Tablet OS Sales Forecast, 2014-2019 (Percentage Share)	21
Europe Tablet Sales By Form Factor	21
Table 10: Europe Tablet Sales by Form Factor, 2014-2019	22
Figure 10: Europe Tablet Sales by Form Factor, 2014-2019	22
Europe Tablet Sales By Connectivity Option.....	22
Table 11: Europe Tablet Sales by Connectivity Option, 2014-2019	23

Quoting information from an iGillottResearch publication: external — any iGillottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from iGillottResearch. iGillottResearch reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from iGillottResearch. The use of large portions or the reproduction of any iGillottResearch document in its entirety does require prior written approval and may have some financial implications.

Copyright © 2015 iGillottResearch, Inc. Reproduction is forbidden unless authorized.

FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.

Figure 11: Europe Tablet Sales by Connectivity Option, 2014-2019.....	23
Europe Mobile Data Usage Trends by Mobile Operator	24
Vodafone.....	24
Table 12: Average Mobile Data Use, Vodafone Europe.....	24
Table 13: Average Mobile Data Usage, 3G compared to 4G, Vodafone	24
Table 14: Distribution of Monthly Mobile Data Usage in 2014, Vodafone's EU4.....	25
Figure 12: Monthly Mobile Data Usage in 2014, Vodafone's EU4.....	26
Table 15: Change in Streaming Quality, Vodafone Italy	26
Figure 13: Change in Streaming Quality, Vodafone Italy	27
Telefonica.....	27
Vimpelcom	27
Table 16: Mobile Data Usage by Country, Vimpelcom	28
Telenor	29
Table 17: Mobile Data Usage in Norway with Telenor	30
MTS.....	30
Table 18: MTS Key Mobile Data-related Stats,	30
Table 19: MTS Key Mobile Data-related Stats,	30
Table 20: MTS Mobile Data Usage.....	31
Table 21: MTS Downlink Speeds.....	31
Mobile Data Traffic Forecast Methodology	33
Assumptions Around Data Traffic	33
Connections, not Subscribers.....	35
Estimating Data Use per Activity.....	35
Connections Data Usage Categories.....	36
Europe Mobile Data Traffic Forecast, 2014-2019.....	38
Mobile Data Traffic by Connections	38
Table 22: Europe Population and Connections, 2014-2019 (000s).....	38
Table 23: Europe Connections per Usage Category, 2014-2019 (000s).....	39
Figure 14: Europe Connections per usage category, 2014-2019	39
Table 24: Europe Mobile Data Usage per Connection per Month (MB), 2014-2019.....	40
Figure 15: Europe Mobile Data Usage per Connection per Month (MB), 2014-2019	40
Table 25: Total Europe Mobile Data Traffic (TB) per Month by Connections usage category, 2014-2019.....	41
Figure 16: Total Europe Mobile Data Traffic (TB) per Month by Connections usage category, 2014-2019.....	41
Table 26: Total Europe Mobile Data Traffic by Connections usage category, 2014-2019 (percent)	42
Figure 17: Total Europe Mobile Data Traffic by Connections usage category, 2014-2019 (percent)	42
Mobile Data Traffic by Subscriber and Connection.....	43
Table 27: Europe Mobile Data Usage per Month (MB) per subscriber and connection, 2014-2019.....	43
Figure 18: Europe Mobile Data Usage (MB) per Month per subscriber and connection, 2014-2019.....	44

Quoting information from an iGillottResearch publication: external — any iGillottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from iGillottResearch. iGillottResearch reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from iGillottResearch. The use of large portions or the reproduction of any iGillottResearch document in its entirety does require prior written approval and may have some financial implications.

Copyright © 2015 iGillottResearch, Inc. Reproduction is forbidden unless authorized.

FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.

Europe Wi-Fi Offload Traffic Forecast, 2014-2019	45
User-Driven Wi-Fi Offload.....	45
Table 28: Europe User-Driven Wi-Fi, 2014-2019 (TB/Month)	46
Figure 19: Europe User-Driven Wi-Fi, 2014-2019 (TB/Month)	47
Carrier-Driven Wi-Fi Offload	47
Table 29: Europe Carrier-Driven Wi-Fi Offload, 2014-2019 (TB/month)	48
Figure 20: Europe Carrier-Driven Wi-Fi Offload, 2014-2019 (TB/Month).....	48
Wi-Fi Only.....	48
Table 30: Europe Wi-Fi Only Traffic, 2014-2019 (TB/Month)	49
Figure 21: Europe Wi-Fi Only Traffic, 2014-2019 (TB/Month).....	50
Definitions.....	51
General.....	51
Device Types.....	51
Services	52
Network Technology.....	53
About iGR	57
Disclaimer.....	57

Quoting information from an iGillottResearch publication: external — any iGillottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from iGillottResearch. iGillottResearch reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from iGillottResearch. The use of large portions or the reproduction of any iGillottResearch document in its entirety does require prior written approval and may have some financial implications.

Copyright © 2015 iGillottResearch, Inc. Reproduction is forbidden unless authorized.

FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.

Abstract

Mobile subscribers in Europe increasingly depend on a variety of mobile devices, including smartphones, tablets and connected cars, to stay connected. At the same time, they are increasing their usage of mobile data, both on the mobile 3G/4G network and Wi-Fi.

This market study overviews the European mobile market and includes detailed information and a five-year forecast for the following areas of the market:

- Mobile Connections
- Smartphone Sales
- Tablet Sales
- Mobile Data Traffic
- Wi-Fi Offload Traffic.

Key questions addressed:

- What is the population of Europe and what is its mobile penetration?
- How many mobile connections exist and how are they expected to grow between 2014 and 2019?
- What is the split of those connections by technology type (GSM, CDMA, UMTS/HSPA and LTE) and generation (2G, 3G and 4G)?
- What are the anticipated global handset and smartphone sales for 2014 to 2019?
- What are the anticipated tablet sales for 2014 to 2019?
- What is mobile data usage today and at what rate is mobile data usage expected to grow over the forecast period?
- How does mobile data usage differ between light, medium, heavy and extreme connections?
- How much Wi-Fi Offload traffic (user-driven, carrier-driven, and Wi-Fi only) is expected through 2019?

Who should read this report?

- Mobile operators
- Device OEMs

Quoting information from an iGillottResearch publication: external — any iGillottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from iGillottResearch. iGillottResearch reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from iGillottResearch. The use of large portions or the reproduction of any iGillottResearch document in its entirety does require prior written approval and may have some financial implications.

Copyright © 2015 iGillottResearch, Inc. Reproduction is forbidden unless authorized.

FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.

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

Quoting information from an iGillottResearch publication: external — any iGillottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from iGillottResearch. iGillottResearch reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from iGillottResearch. The use of large portions or the reproduction of any iGillottResearch document in its entirety does require prior written approval and may have some financial implications.

Copyright © 2015 iGillottResearch, Inc. Reproduction is forbidden unless authorized.

FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.