

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

Market Study  
First Quarter 2015





---

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

---

A Market Study

Published First Quarter, 2015  
Version 1.0  
Report Number: 1Q2015-01

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

# Table of Contents

---

<b>Abstract</b> .....	<b>1</b>
<b>Executive Summary</b> .....	<b>3</b>
Figure A: Global Connections by Technology Generation, 2014-2019 .....	3
<b>Methodology</b> .....	<b>6</b>
<b>Introduction</b> .....	<b>7</b>
<b>Worldwide Overview</b> .....	<b>9</b>
Table 1: Worldwide Connections, Population, and Penetration, 2014-2019 .....	9
Figure 1: Worldwide Connections and Population, 2014-2019 (000).....	9
Table 2: Connections by Region, 2014-2019 (000) .....	10
Figure 2: Connections by Region, 2014-2019 (000) .....	11
Table 3: Share of Connections by Region, 2014-2019 (percent) .....	11
Figure 3: Share of Connections by Region, 2014-2019 (percent) .....	12
Table 4: Worldwide Connections by Technology Generation, 2014-2019 (000) .....	13
Figure 4: Worldwide Connections by Technology Generation, 2014-2019 (000).....	13
Table 5: Worldwide Connections by Technology, 2014-2019 (000) .....	14
Figure 5: Worldwide Connections by Technology, 2014-2019 (000).....	15
<b>North America</b> .....	<b>16</b>
Table 6: North America Connections, Population, and Penetration, 2014-2019 .....	16
Figure 6: North America Connections and Population, 2014-2019 (000).....	17
Table 7: North America Connections by Technology Generation, 2014-2019 (000) .....	17
Figure 7: North America Connections by Technology Generation, 2014-2019 (000).....	18
Table 8: North America Connections by Technology, 2014-2019 (000) .....	19
Figure 8: North America Connections by Technology, 2014-2019 (000) .....	20
<b>Latin America and Caribbean</b> .....	<b>21</b>
Table 9: Latin America Connections, Population, and Penetration, 2014-2019 .....	21
Figure 9: Latin America Connections and Population, 2014-2019 (000) .....	22
Table 10: Latin America Connections by Technology Generation, 2014-2019 (000).....	22
Figure 10: Latin America Connections by Technology Generation, 2014-2019 (000) .....	23
Table 11: Latin America Connections by Technology, 2014-2019 (000).....	24
Figure 11: Latin America Connections by Technology, 2014-2019 (000).....	25
<b>Europe</b> .....	<b>26</b>
Table 12: Europe Connections, Population, and Penetration, 2014-2019 .....	26
Figure 12: Europe Connections and Population, 2014-2019 (000).....	27
Table 13: Europe Connections by Technology Generation, 2014-2019 (000) .....	27
Figure 13: Europe Connections by Technology Generation, 2014-2019 (000).....	28
Table 14: Europe Connections by Technology, 2014-2019 (000) .....	29
Figure 14: Europe Connections by Technology, 2014-2019 (000) .....	29

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.

<b>Middle East and Africa .....</b>	<b>30</b>
Table 15: Middle East and Africa Connections, Population, and Penetration, 2014-2019 ...	30
Figure 15: Middle East and Africa Connections and Population, 2014-2019 (000) .....	31
Table 16: Middle East and Africa Connections by Technology Generation, 2014-2019 (000)	
.....	31
Figure 16: Middle East and Africa Connections by Technology Generation, 2014-2019 (000)	
.....	32
Table 17: Middle East and Africa Connections by Technology, 2014-2019 (000).....	33
Figure 17: Middle East and Africa Connections by Technology, 2014-2019 (000) .....	33
<b>Asia-Pacific .....</b>	<b>34</b>
Table 18: Asia-Pacific Connections, Population, and Penetration, 2014-2019 .....	34
Figure 18: Asia-Pacific Connections and Population, 2014-2019 (000) .....	35
Table 19: Asia-Pacific Connections by Technology Generation 2014-2019 (000).....	35
Figure 19: Asia-Pacific Connections by Technology Generation, 2014-2019 (000) .....	36
Table 20: Asia-Pacific Connections by Technology, 2014-2019 (000).....	37
Figure 20: Asia-Pacific Connections by Technology, 2014-2019 (000) .....	37
<b>Japan .....</b>	<b>38</b>
Table 21: Japan Connections, Population, and Penetration, 2014-2019 .....	38
Figure 21: Japan Connections and Population, 2014-2019 (000) .....	39
Table 22: Japan Connections by Technology Generation, 2014-2019 (000).....	39
Figure 22: Japan Connections by Technology Generation, 2014-2019 (000) .....	40
Table 23: Japan Connections by Technology, 2014-2019 (000).....	40
Figure 23: Japan Connections by Technology, 2014-2019 (000) .....	41
<b>Definitions .....</b>	<b>42</b>
<b>General.....</b>	<b>42</b>
<b>Device Types.....</b>	<b>42</b>
<b>Services .....</b>	<b>43</b>
<b>Network Technology.....</b>	<b>44</b>
<b>Regions.....</b>	<b>48</b>
<b>About iGR .....</b>	<b>49</b>
<b>Disclaimer.....</b>	<b>49</b>

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 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?

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.

- What are the major markets for LTE both today and throughout the forecast period?
- When does *iGR* 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.

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.