



An Coimisiún um  
**Rialáil Cumarsáide**  
Commission for  
**Communications Regulation**

# Mobile Data Traffic Forecast in Ireland (2018-2022)

## Summary of main findings

### Information Notice

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## Additional Information

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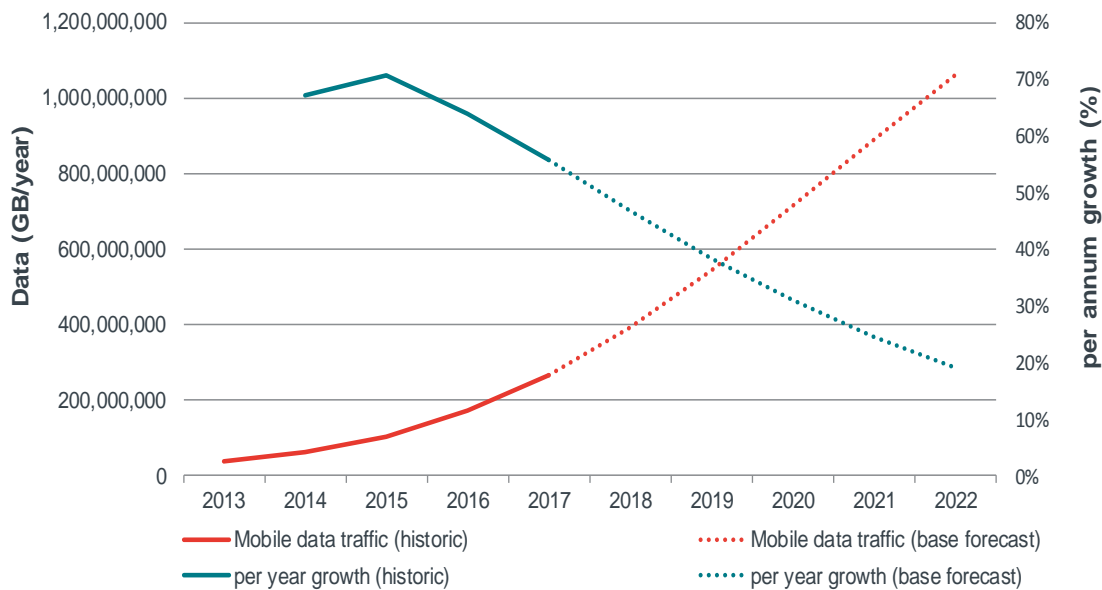
# 1 Mobile Data Traffic Forecast in Ireland

## 1.1 Introduction

1. This report supports ComReg in implementing Action 33 of the Mobile Phone and Broadband Taskforce (the 'Taskforce'). This Taskforce was set up to identify tangible actions that could be taken to improve the quality of broadband and mobile voice services.
2. The Taskforce recommended that ComReg engage with a suitable third party to produce a publication that sets out a five year forecast of mobile data traffic that is reviewed and updated and made available on ComReg's website.
3. In October 2017, ComReg appointed Frontier Economics Ltd. ("Frontier") as a 'Service Provider' to produce this publication. The mobile data traffic forecast is published alongside this document as Document 18/35.

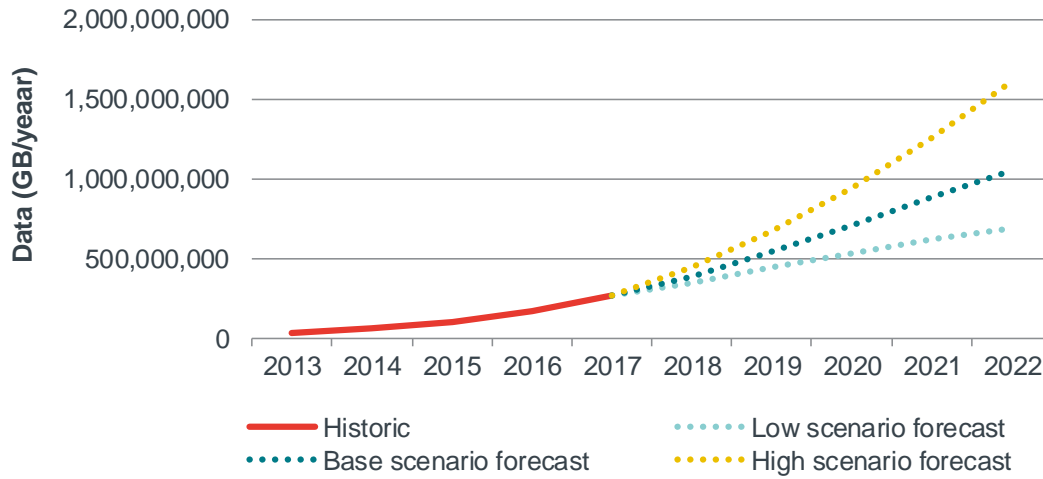
## 1.2 Frontier Forecasts

4. Frontier developed a model which disaggregates current mobile data usage by device type (smartphone, 2G phone, Mobile Broadband (MBB), and Machine to Machine (M2M)). The forecasts of mobile data traffic take 2017 as the base year and then forecasts changes in demand for mobile data. Based on recent usage trends in Ireland, the model then forecasts the total number of devices and the total mobile data use per device. Frontier forecasts that the demand for mobile data in Ireland will grow at an average of 32% per year up to 2022, though the rate of growth will slow during the forecast period, as indicated by the blue line in Figure 1 below. Total annual mobile data traffic is forecast to increase from 268 million GB/year in 2017 to 1,059 million GB/year in 2022, as illustrated in Figure 1.

**Figure 1: Base forecast of mobile data traffic**

5. This increase in the demand for mobile data is driven by a number of factors. On the demand side, the growing use of mobile devices for audio-visual content and sending data-rich content via social networks is increasing data usage. On the supply side, increased availability of 4G services and sophisticated devices entering the market along with the declining cost of data plans driven by retail competition (including “all you can eat” plans) will continue to impact consumption patterns.
6. The rate of growth is anticipated to slow over the forecast period. This mainly arises as the extent to which migration to 4G fuels growth begins to slow and the number of 4G subscriptions reaches market saturation. Further, the increasing use of Wi-Fi off-load (i.e. using mobile devices on fixed networks via Wi-Fi), will offset some of the growth as fixed broadband penetration rates continue to increase, particularly in rural areas.
7. In recognition of the uncertainty around the future use of mobile data, Frontier also provided low and high forecasts, as presented in Figure 2, by varying certain assumptions on penetration and mobile data use per device to account for different consumer behaviours. All three scenarios forecast increasing mobile data usage with rate of growth slowing over the duration of the forecast.

**Figure 2: Scenario forecasts of total mobile data traffic**



- Finally, ComReg will continue to monitor market developments and will update the forecasts to take account of any new information that is available, and will make any future forecasts or reports available on ComReg’s website.