

Global Internet access market, segmented by scale of total Internet access revenue, and mobile Internet's share of total Internet access revenue, 2019

By 2019, mobile will account for the majority of Internet access revenue in a disparate range of markets



Larger-scale, higher mobile Internet share

Several of the largest markets in the world will see Internet access revenue dominated by mobile in 2019, ranging from India, where mobile infrastructure is growing more rapidly than fixed-line infrastructure as a more expedient option, to the US, where consumers are embracing mobile connectivity partly as a lifestyle choice.

Note: Markets with total Internet access revenue of US\$4bn or more in 2019, where mobile Internet access revenue will account for 60% or more of total Internet access revenue in 2019



Larger-scale, lower mobile Internet share

Among large countries in Western Europe and Asia that have seen heavy investment in fixed broadband infrastructure, mobile's share of total Internet access revenue will remain relatively low through to 2019. This is particularly true for urbanised geographies which offer relatively few logistical difficulties in terms of fixed broadband access.

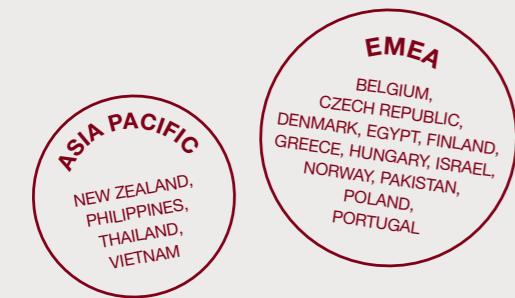
Note: Markets with total Internet access revenue of US\$4bn or more in 2019, where mobile Internet access revenue will account for less than 60% of total Internet access revenues in 2019



Smaller-scale, lower mobile Internet share

Slower-growing mobile Internet markets have evolved in different ways. In some, such as Pakistan, mobile Internet is emerging slowly because of a lack of infrastructure and relatively low device adoption. Meanwhile, in mature markets such as Denmark, established fixed-line broadband provision still accounts for at least 40% of Internet access, despite the ubiquity of smartphone ownership.

Note: Markets with total Internet access revenue of less than US\$4bn in 2019, where mobile Internet access revenue will account for less than 60% of total Internet access revenue in 2019



Smaller-scale, higher mobile Internet share

Those smaller countries with higher mobile share of Internet access revenue are not all alike. The grouping includes sophisticated highly urban territories in Asia and Europe, and rapidly emerging markets in Africa and Latin America. Reasons for these two disparate groups sharing a quadrant include the rise of superfast mobile Internet access trumping the stasis of fixed broadband (Hong Kong and Singapore, for example), or mobile becoming the fastest way to gain Internet access in countries where fixed broadband infrastructure has never been comprehensively coordinated, alongside smartphone costs having reduced (such as Kenya and Peru).

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