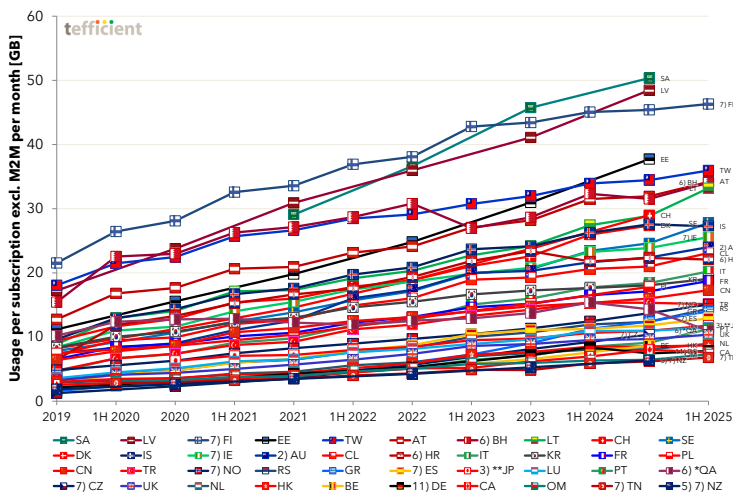


# ARPU growth softens further as mobile data usage growth slows in more than half of the countries



Tefficient's 46<sup>th</sup> public analysis of mobile data trends and drivers compares data from 40 countries where M2M/IoT can be excluded from the total bases. Mobile data usage grew year-on-year in most markets, but Turkey and Qatar recorded declines.

Saudi Arabia remains the usage leader and Latvia the runner-up, although statistics for both countries aren't available for the first half of 2025.

After the sharp slowdown from 2023 to 2024, usage growth rates have largely stabilised. However, more than half of the countries had slower growth in the first half of 2025 compared with the same period in 2024. Among the countries reported, Portugal posted the highest annual increase at 32%.

Data-only subscriptions - though still representing a small share of the market - continue to drive average usage levels. Latvia leads with 195 GB per month in 2024, followed by Sweden with 156 GB per month in the first half of 2025. In the pure FWA segment, Australia topped the chart with 459 GB per month in the first half of 2025, followed by Sweden with 379 GB and Ireland with 294 GB per month.

In contrast to data-only subscriptions, the impact of 5G on overall traffic remains limited - except in South Korea, China, Austria, and Lithuania.

Mobile service revenue per gigabyte continued to decline overall, although at a slower pace than before. Portugal saw the steepest drop at 27%. However, inflation-hit Turkey again recorded a surge in revenue per gigabyte, and Finland, Croatia and possibly Germany also saw increases.

Only 54% of markets experienced ARPU growth, even though 92% had growth in data usage - once again a softer outcome than in the previous edition of this analysis.

## The M2M/IoT reporting dilemma

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This page is about methodology issues and can be skipped.

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Regulators' reporting of M2M/IoT<sup>1</sup> subscriptions continues to create a challenge for the comparability between countries. To make this *excluding-M2M* analysis, we had to exclude countries where M2M subscriptions aren't broken out in the reporting of the respective regulator<sup>2</sup>: USA, Singapore, Romania, India, Mexico, Malaysia, Peru, Pakistan, Slovenia, and Cyprus.

To allow full comparability between countries in this excluding-M2M context, regulators must break out all these three data points in their reporting:

1. M2M subscriber base
2. M2M data traffic
3. M2M revenue

This is done in four countries: **Sweden, Norway, Greece, and Bahrain**. We appreciate that the regulators PTS, Nkom, EETT, and TRA have done this since it allows us to calculate the error that would be made if only the M2M subscriber base (but not the M2M data traffic nor M2M revenue) was reported.

**Taiwan and New Zealand** exclude M2M from all three data points and is therefore also fully correct and comparable. **Qatar** also excludes M2M from all three data points but only reports its base of data-enabled mobile subscriptions, excluding voice-only subscriptions.

For **Australia**, M2M base and M2M traffic are reported and as Telstra breaks out M2M revenue in its reporting, it has been excluded (but not the M2M revenue of the other two MNOs, Optus and TPG Telecom, as these aren't reported).

The regulators in the remaining countries most often only break out M2M subscriptions - not M2M data traffic and seldomly M2M revenue. For these markets, the consequence of this is:

- The **mobile data usage is slightly overstated** as the M2M data traffic is included, but not the M2M base.
- Since the M2M data traffic and the M2M revenue is included, the **revenue per GB is affected, likely overstated**.
- Since the M2M revenue is included, but not the M2M base, the **ARPU is slightly overstated**.

The error is estimated to be less than 1% on the usage side and 1-3% on the revenue side.

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<sup>1</sup> Hereafter called M2M.

<sup>2</sup> In the case of USA, the industry association CTIA.

## The FWA reporting dilemma

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This page is also about methodology issues and can be skipped.

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In addition to M2M/IoT, the reporting of FWA subscriptions create a challenge for the comparability between countries. Our ambition is to have **mobile-based FWA included** in this report as FWA subscribers generate traffic on the mobile networks and often substitute the more historical mobile broadband subscriptions (MBB) which always were regarded as mobile.

Most regulators also regard mobile-based FWA as a mobile broadband service, but some regard it as a fixed broadband service. The latter is no problem if the FWA subscription base, the FWA data traffic and the FWA revenue are reported. When can then reallocate FWA into mobile and get an apple-to-apple comparison with those countries that include it in mobile from the outset.

But there are a few countries that regard mobile-based FWA as a fixed broadband service - *without* reporting FWA subscription base, FWA data traffic and FWA revenue (or parts thereof).

Where it is impossible to add mobile-based FWA back into mobile, we have still included these countries but with a "7) Excl. FWA" note. At present, this is the case for **seven of our 40 countries**:

- Czechia
- Finland
- Germany
- Ireland
- New Zealand
- Norway
- Tunisia

But within this group of countries, there are still definition differences.

In **Finland**, only the FWA subscriptions that come with a performance commitment or where capacity has been reserved are excluded. This is a small subset of the overall FWA market in Finland.

For **Germany**, this is true only from 2024 onwards.

For **Ireland** we will, for some metrics, be able to show also the FWA-only value.

## Data usage is still growing year-on-year in all countries - but two

Figure 1 shows the development of mobile data usage for 40 countries where regulators report mobile data traffic and where M2M subscribers can be excluded from the total mobile base. The usage is shown per mobile subscription<sup>3</sup> per month.

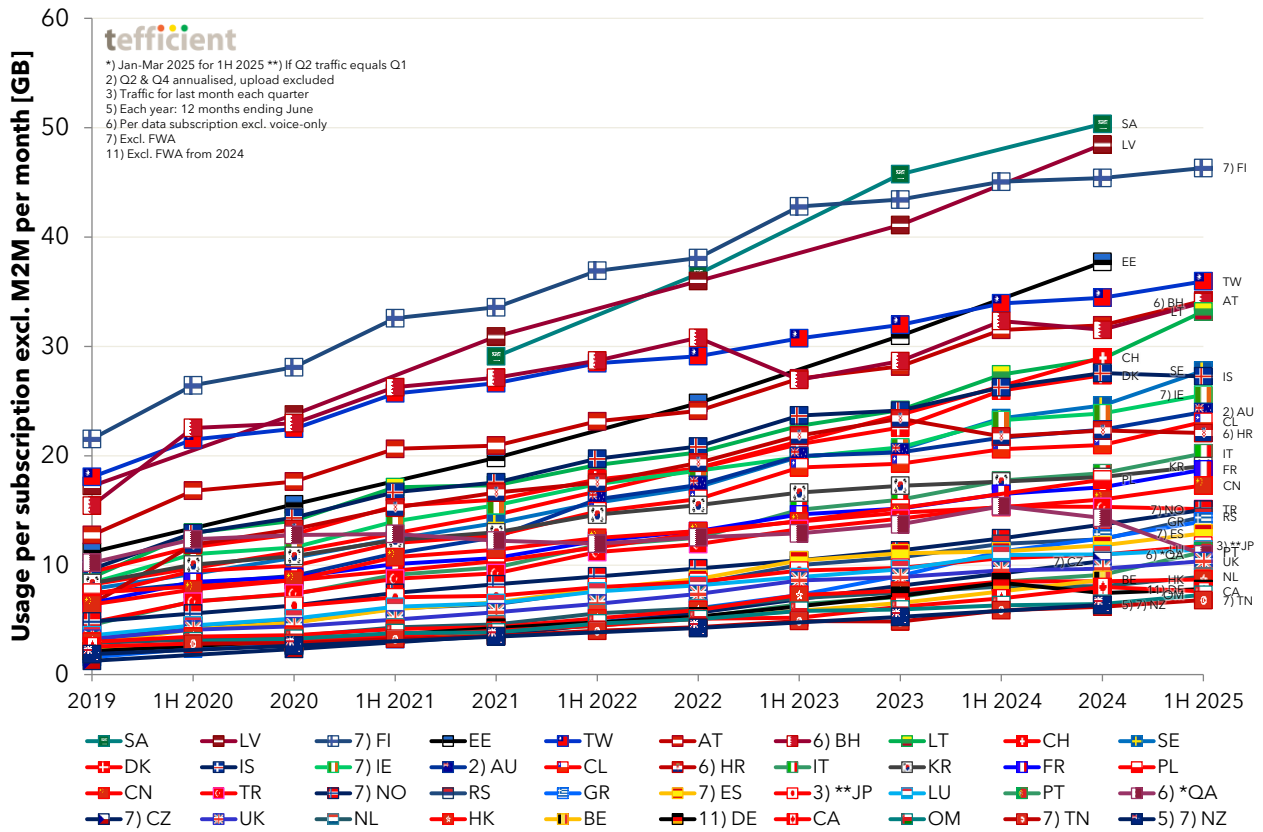


Figure 1. Development of mobile data usage per subscription (excl. M2M) per month - the legend shows the ranking<sup>4</sup>

Let's start from the top of the chart: The average mobile subscription in **Saudi Arabia** consumed **50.4 GB** of mobile data per month in 2024. **Latvia** is the runner-up with 48.5 GB per month in 2024. **Finland**, reported twice a year, is third-ranked with its **46.3 GB** per month in the first half of 2025.

**Finland** excludes the traffic from about 60k fixed wireless access (FWA) subscribers with a performance commitment or capacity reservation, though. Since such FWA customers likely have very high usage, Finland could possibly have been higher ranked if that traffic was included, but it is not broken out of the regulator's reported fixed broadband traffic.

<sup>3</sup> Including also mobile subscriptions without a subscription of mobile data (if any), i.e. the total mobile subscription base.

<sup>4</sup> Denmark changed its reporting frequency to just annual. Austria has not reported full detail for Q2 2025 yet. Serbia has not yet reported 2024 revenue.

Based on a 2024 figure, **Estonia** is fourth, **Taiwan** fifth, **Bahrain** sixth, **Austria** seventh (based on Q1 as 1H not yet reported) just ahead of **Lithuania**.

Looking for explanations to the high usage levels, **5G FWA** plays a key role in Saudi Arabia, but no numbers are reported specifically for FWA. According to the Saudi regulator (CST), **unlimited data** subscriptions represented **35%** of the base in 2024. FWA has for long been an important part of **Latvia**'s broadband base, but the introduction of 5G FWA has accelerated the traffic development since 2023. As to Finland, **87%** of the Finnish non-M2M subscriptions had **unlimited data volume** in June 2025. If we exclude voice-only subscriptions, that share grows to 90%. No other country is as unlimited as Finland.

Although the legend below Figure 1 shows the ranking of the 40 countries, it's difficult to spot them all. Figure 2 offers an easier visualisation.

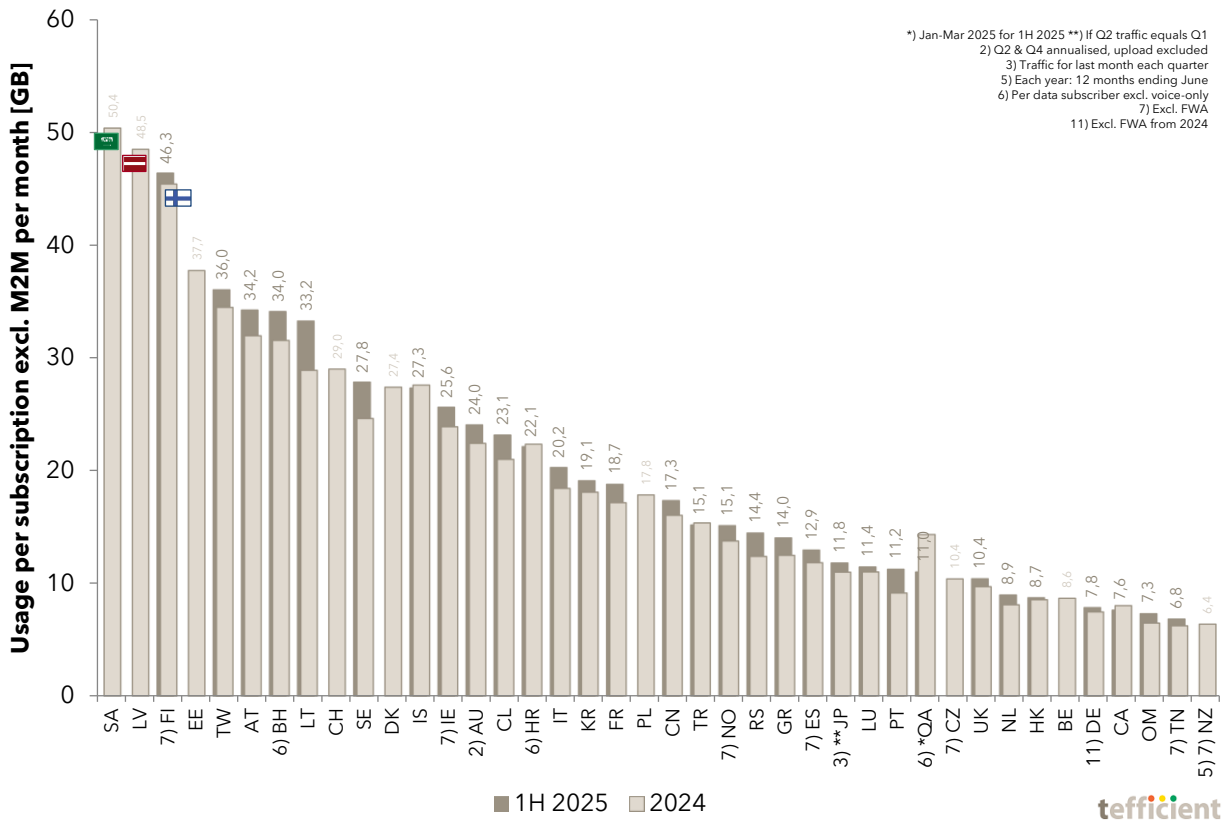


Figure 2. Mobile data usage per subscription (excl. M2M) per month, first half of 2025 and full year 2024

In comparison to our historical reports there's not much dark grey on top of the 2024 light grey bars which shows that for most markets, there was little usage growth in the first half of 2025.

The markets with the lowest data usage in Figure 2 are **New Zealand**<sup>5</sup>, **Tunisia**<sup>6</sup>, **Oman**, **Canada**, **Germany**<sup>7</sup>, **Belgium**, **Hong Kong**, the **Netherlands**, the **UK**, and **Czechia**<sup>6</sup>.

Figure 3 is a zoom-in on the lower end of Figure 1.

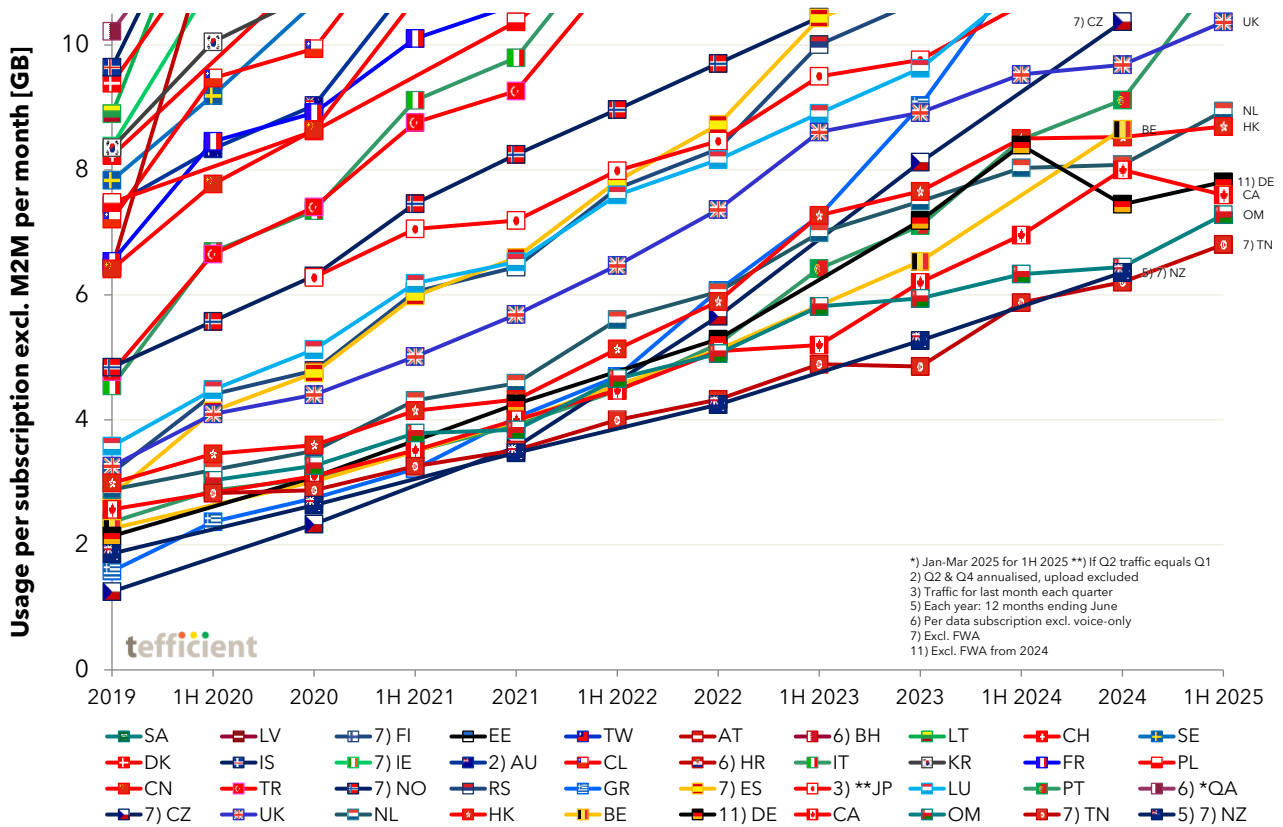


Figure 3. Development of mobile data usage per subscription (excl. M2M) per month [zoom-in on low end]

There are only eight countries left with a usage lower than 10 GB per month among our 40. Six of them report every half year. Although usage is low, the growth rates are not high: Tunisia 16%, Oman 15%, the Netherlands 11%, Canada 9%, and Hong Kong 3%. Germany even had a decline of 7%, but that's attributable to regulator Bnetza excluding FWA from the full year of 2024 onwards.

<sup>5</sup> For the year to June 2024. Note that FWA traffic is excluded from the reported mobile data traffic of the regulator.

<sup>6</sup> Note that FWA traffic is excluded from the reported mobile data traffic of the regulator.

<sup>7</sup> Note that FWA traffic is excluded from the reported mobile data traffic of the regulator from 2024.

## Data usage growth fastest in Portugal

Figure 4 shows the growth in average usage per subscription between the first half of 2024 and the first half of 2025.

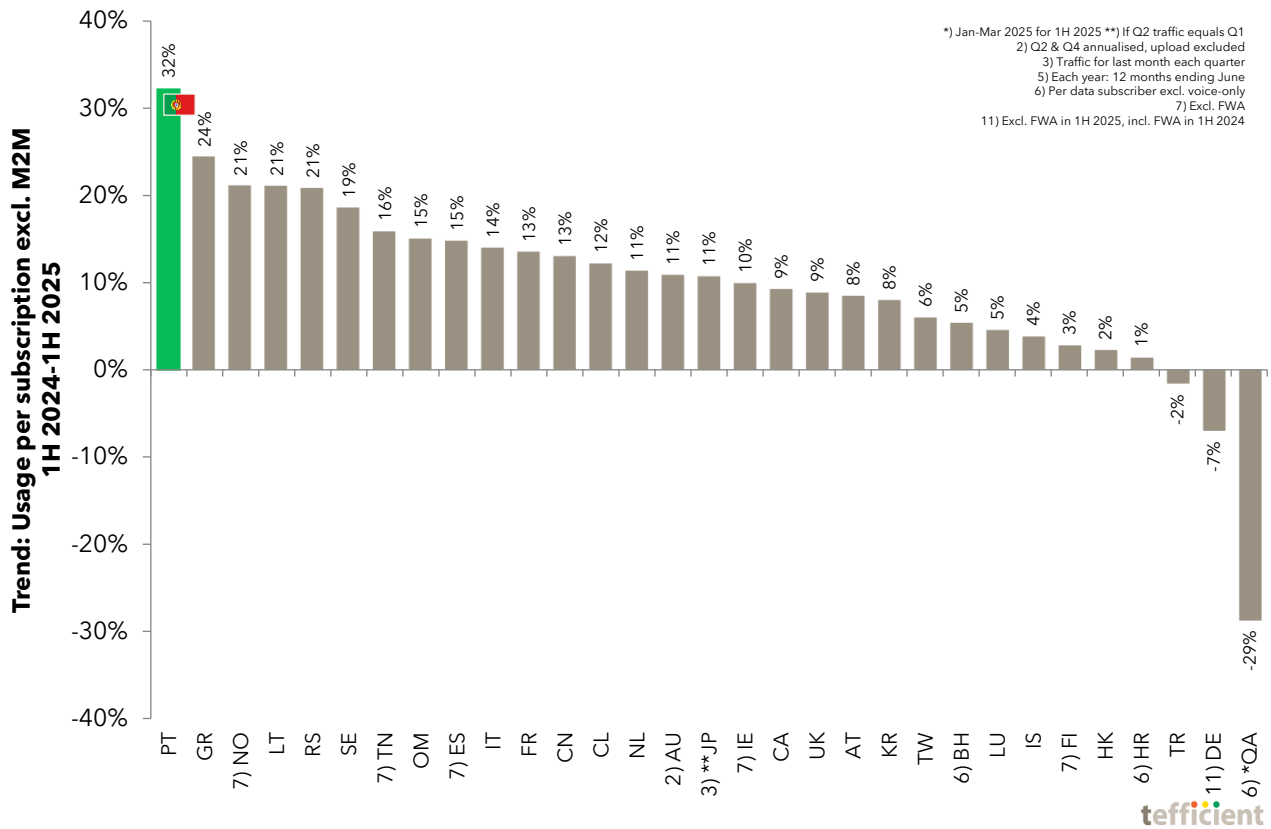


Figure 4. Development of mobile data usage per subscription (excl. M2M) 1H 2024-1H 2025 [in %]

Of the countries that have reported 1H 2025, **Portugal** had the fastest growth in mobile data usage, **32%**. **Greece** is the runner-up with 24%. There are three countries sharing a third position with 21%: **Norway**, **Lithuania**, and **Serbia**.

At the right end of the scale, we find **Qatar** with a **decline of 29%**. **Germany** too had usage decline, but that's a consequence of FWA being excluded in the regulatory reporting for 1H 2025 but not for 1H 2024. Also **Turkey** had usage decline, but slower, 2%.

Usage in **Croatia**, **Hong Kong**, and **Finland** grew - but just in between 1% and 3%.

If we compare the usage growth rates with that of the previous year, see Figure 5, we observe that usage growth rates more often have declined than increased.

Qatar and Turkey had declining usage, Portugal the fastest usage growth.

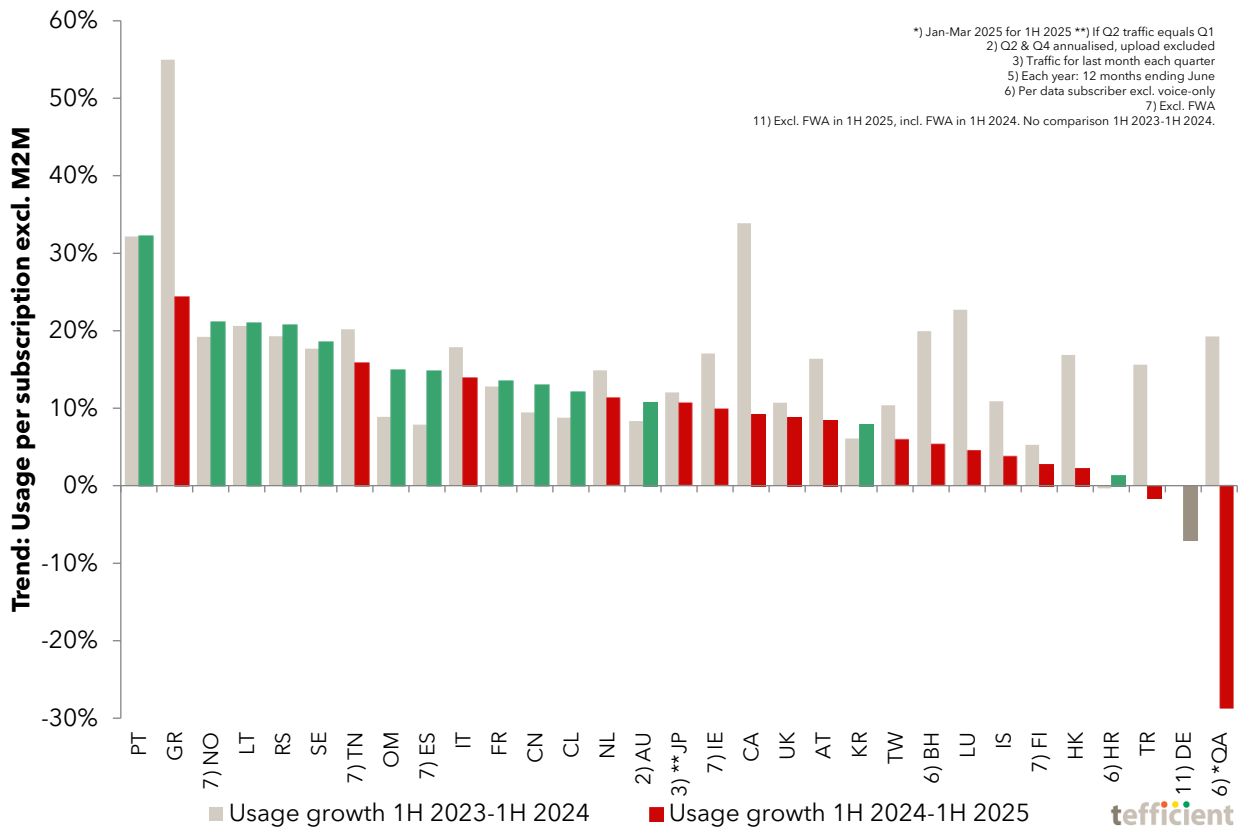


Figure 5. Development of mobile data usage per subscription (excl. M2M) 1H 2024-1H 2025 vs. 1H 2023-1H 2024 [in %]

Of our 31 countries having reported 1H 2025, 13 (green bars) exhibited an increase in the usage growth rate compared to the previous year. In 17 countries (red bars), the usage growth rate was decelerating. For Germany, there is no comparison available for 1H 2023-1H 2024.

If comparing to our [previous report](#) where a clearer majority of countries experienced a decrease, Figure 5 shows a development in the direction of **more green and less red**. Our sample is through smaller here as eight countries do not report half-yearly.

The mobile data usage growth is decelerating in a majority of countries - but not as large share as in 2024.

## Data-only rarely more than 20% of base, but defines average usage

Although **fixed wireless access** (FWA) experiences a renaissance with 5G, using mobile networks to substitute fixed broadband isn't something new. In some markets, like **Finland** and **Austria**, this was around for long. The take-up can be significant if the FWA/data-only offers are reasonably charged and without usage caps. It also helps if the fixed broadband offering is weak with much DSL in the mix.

In the second half of 2021, the Finnish regulator, Traficom, followed in the footsteps of Austria's RTR and started to report also fixed data traffic, allowing a calculation of the mobile data traffic proportion of total data traffic to be done also for Finland, see the comparison in Figure 6. From 1H 2023 to 2H 2024, mobile's proportion of traffic fell in Finland, but 1H 2025 represents a stabilisation at 40%.

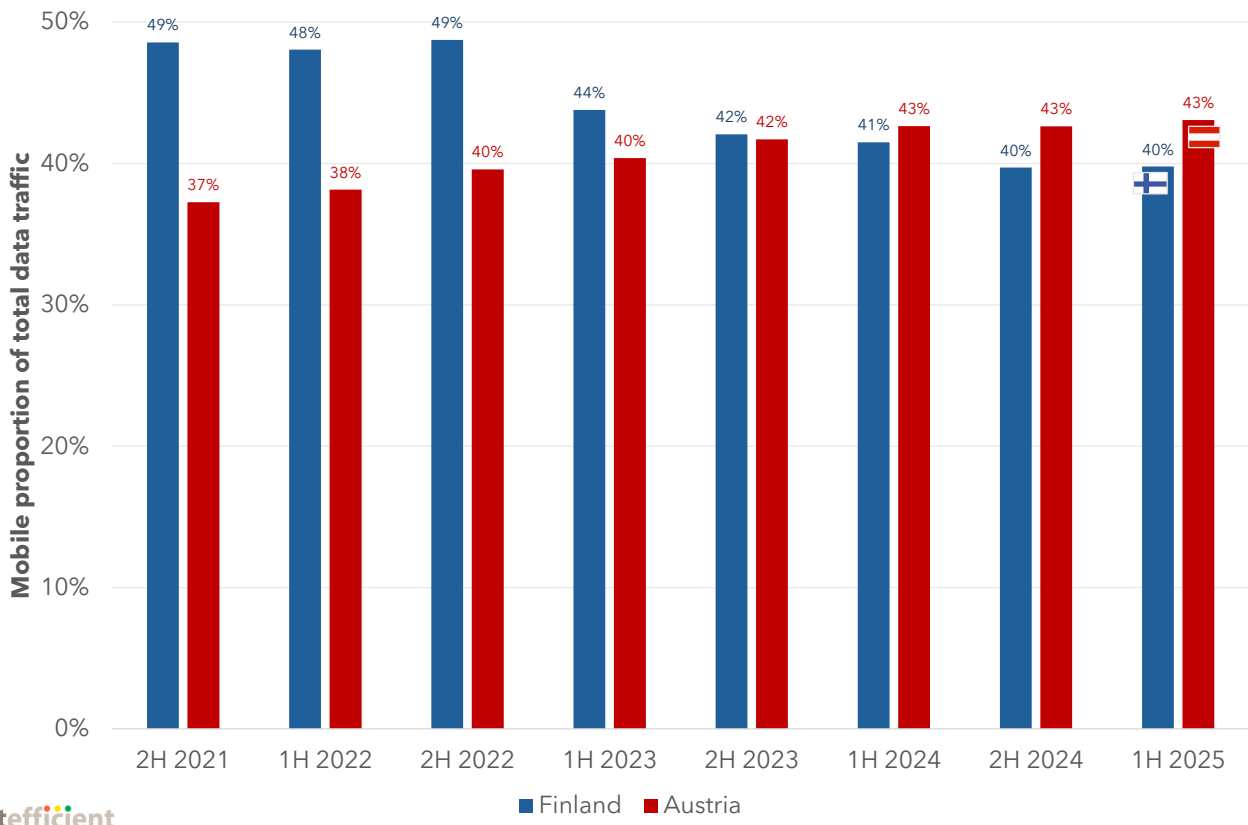


Figure 6. Development in the reported mobile proportion of total data traffic<sup>8</sup> in Finland and Austria, 2H 2021-1H 2025

Austria's proportion didn't decrease like Finland's and Austria hence overtook Finland in the first half of 2024 after which Austria's proportion seems to have plateaued too.

<sup>8</sup> Remember, as mentioned, that the traffic from about 60k FWA subscriptions with a performance commitment or capacity reservation is reported as fixed, not mobile, traffic in Finland.

There are three explanations to the previous deceleration in the mobile traffic proportion in Finland:

- A growing number of Finnish households subscribe to fibre broadband. Compared to the rest of the Nordics, fibre adoption is still at a lower level in Finland, so this trend might continue.
- Since traffic from about 60k FWA subscriptions with a performance commitment or capacity reservation is included in fixed, not mobile, data traffic, the relatively late introduction of such FWA services might have contributed.
- The Finnish mobile market leader, Elisa, stopped reporting its mobile data traffic in 2025 after having explained that an optimised codec in their IPTV service had an impact on the mobile data traffic growth.

With Austria also taking steps in the direction of accelerating fibre broadband rollout, the mobile proportion of traffic might have stabilised in Austria.

**Saudi Arabia** is likely the country with the highest mobile proportion of total data traffic among our countries: In 2024, it was **59%**. The number of data-only subscriptions is however not reported.

Let's now put Finland and Austria into a chart comparing the data-only share of the country's mobile subscription base with all the other reporting countries.

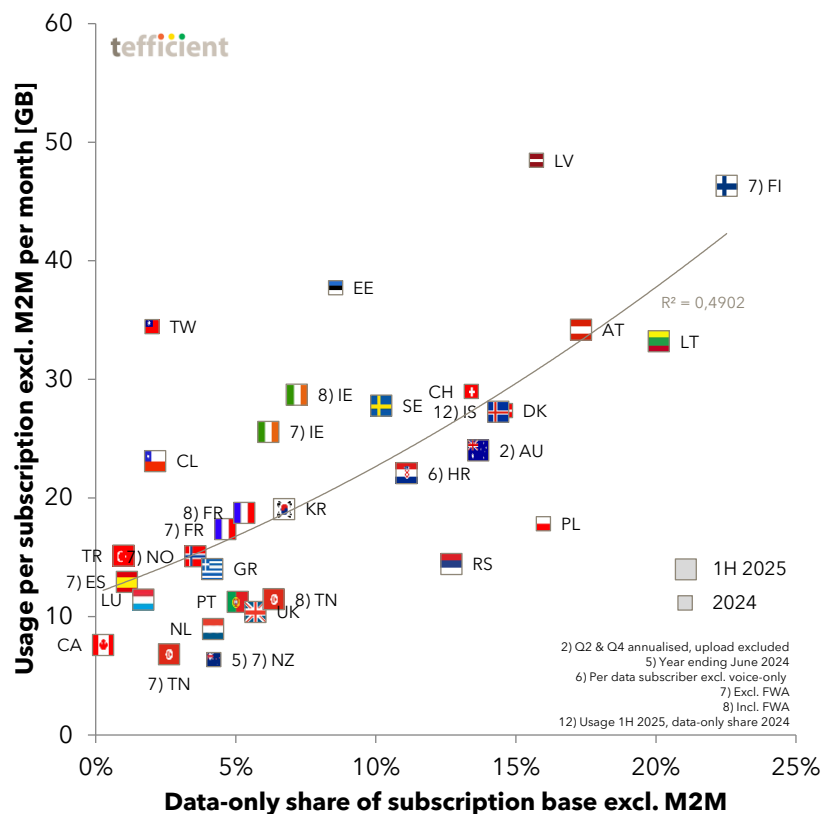


Figure 7. Mobile data usage vs. data-only share

In June 2025, **23%** of the subscription base in Finland was data-only<sup>9</sup>. That makes **Finland** the leader in data-only share of base – and the average mobile data usage is the third highest among our 40 countries. In **Lithuania**, data-only represented 20% of the base and the usage was lower than in Finland. **Austria** was at 17% but with an as high usage as Lithuania. **Poland** was at 16% with lower usage whereas **Latvia** also was at 16% but features the second highest overall usage among our countries.

**Taiwan** is an exception to the overall trend: Its mobile data usage is high although the data-only share of base was just 2%. Albeit at a bit lower usage level, also Chile has low data-only share of base.

Despite these exceptions, the adherence to the regression line is relatively strong. As in all previous reports we therefore conclude that **data-only penetration is a significant driver of the average mobile data usage**.

The easiest way for low-usage countries to grow data usage and expand the mobile market would be to **start addressing and monetising the data-only segment**. This seems to be effective particularly in markets where fast fixed broadband networks (FTTH, FTTB or HFC) aren't already available to a substantial share of the households and businesses.

Read about [Tefficient's FWA Tracker](#) – new edition in 2026

Figure 7 shows that even a relatively low share of data-only subscriptions could lift the average data consumption significantly.

Some of the countries in Figure 7 are also reporting the data-only traffic. For these countries, we can compare the data-only penetration of the subscription base to its share of the total mobile data traffic, see Figure 8.

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<sup>9</sup> Excluding those about 60k FWA subscriptions with a performance commitment or capacity reservation.

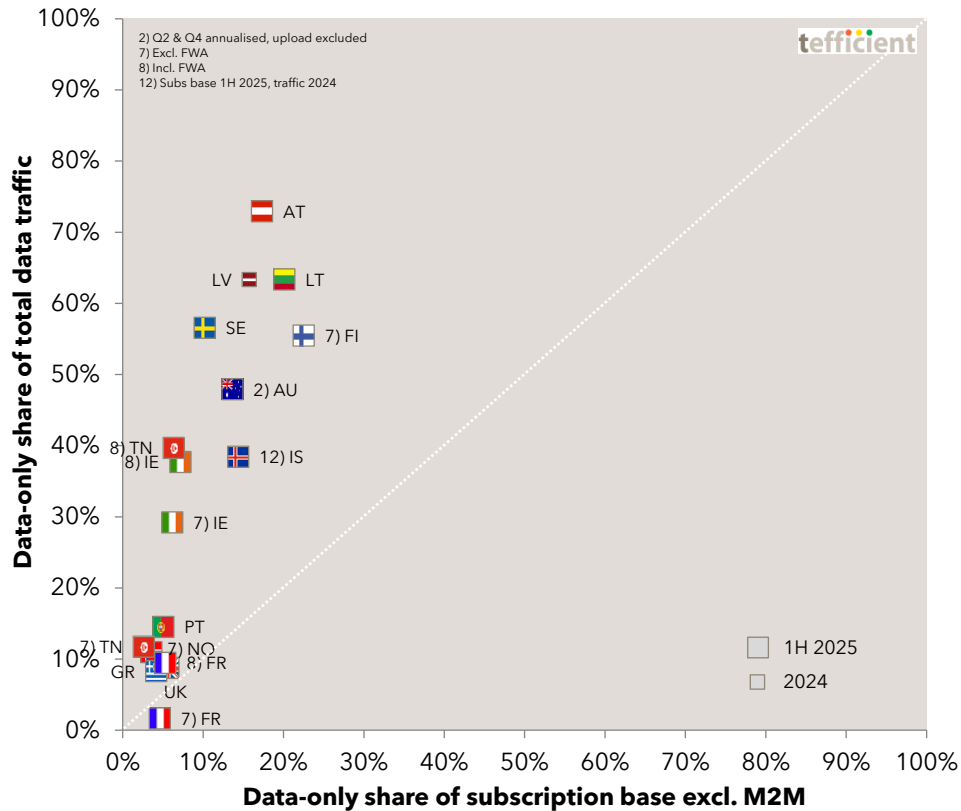


Figure 8. Data-only share of total traffic vs. data-only share of subscription base

Data-only subscriptions carry a disproportionately high share of the data traffic:

- Tunisia (incl. FWA) **6.2x** higher traffic per data-only subscription vs. any subscription
- Sweden (incl. FWA) **5.5x**
- Ireland (incl. FWA) **5.2x**
- Austria (incl. FWA) **4.2x**
- Latvia (incl. FWA) **4.0x**
- Australia (incl. FWA) **3.5x**
- Lithuania (incl. FWA) **3.2x**
- Norway (excl. FWA) **3.1x**
- Portugal (incl. FWA) **2.9x**
- Iceland (incl. FWA) **2.7x**
- Finland (excl. FWA) **2.5x**
- Greece (incl. FWA) **2.0x**
- France (incl. FWA) **1.8x**
- UK (incl. FWA) **1.5x**

For the countries that are reporting both data-only traffic and the number of data-only subscriptions, we can compare the average usage per *data-only* subscription, see Figure 9.

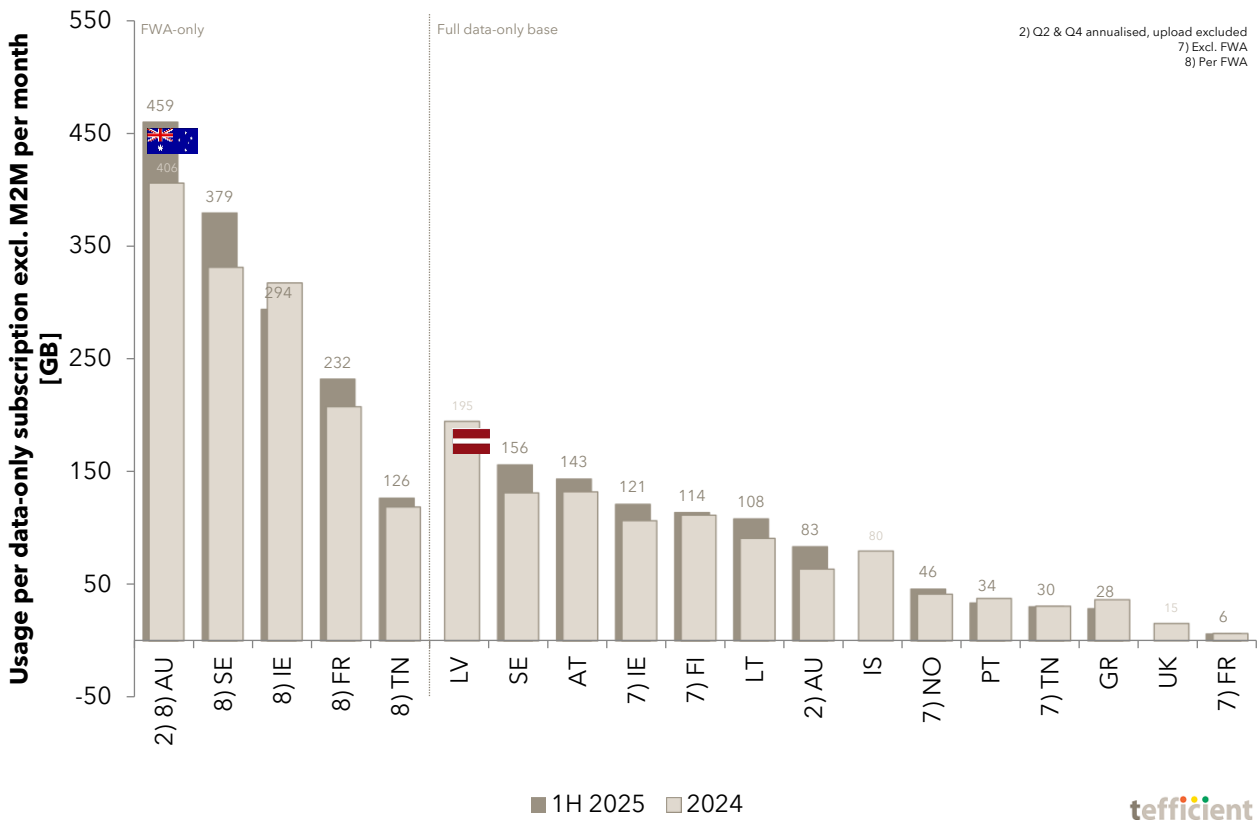


Figure 9. Mobile data usage per data-only subscription per month, first half of 2025 and full year 2024

Starting from the left, the average pure FWA subscription in **Australia**<sup>10</sup> carried **459 GB** of mobile data per month in the first half of 2025. In **Sweden**, the average FWA subscription carried **379 GB** of mobile data per month. **Ireland** follows with **294 GB**. In **France**, the average '4G/5G box' carried **232 GB** of mobile data per month. **Tunisia** ends the FWA-only listing with **126 GB**.

If instead looking at the whole data-only base (not just the pure FWA segment), **Latvia** leads with an average mobile data consumption per data-only subscription of **195 GB** per month in 2024. **Sweden** and **Austria** follow with **156 GB** and **143 GB** per month respectively.

In comparison to our previous reports, there's more dark grey on top of the 2024 light grey bars which shows that for some markets, there was a little more usage growth in the first half of 2025. FWA seems to drive growth in **Australia**<sup>11</sup> and **Sweden** where FWA traffic was 43% and 33% of the total mobile data traffic respectively in the first half of 2025. **France** too had good FWA usage growth triggered by a wider introduction of 5G FWA. **Ireland** represents a contrast where the average FWA usage fell.

The average Latvian data-only subscription consumed a leading 195 GB per month in 2024.

<sup>10</sup> Includes three categories: Wireless home broadband, NBN Wireless Plus, and non-NBN fixed wireless.

<sup>11</sup> ACCC has lowered historical figures.

If **5G FWA** should become the fibre-over-radio solution that e.g. T-Mobile USA, Verizon and India's Jio suggest, the data-only FWA usage figures of Australia, Sweden, and Ireland give a taste of the usage that the solution must at least manage. Fixed broadband usage is yet higher - often north of 500 GB per month.

### Unlike data-only, 5G adoption is seldom a driver of data traffic

Little by little, regulators are starting to report 5G subscriber bases. In a similar way as we correlated the data-only share of total mobile data with the data-only share of the subscription base, Figure 10 tries to do the same for 5G.

There are a few issues:

- In many countries, regulators reporting 5G subscribers aren't reporting 5G traffic (Chile, France, Croatia, Hong Kong, Taiwan, Iceland, Greece, and Japan).
- In Spain, Romania<sup>12</sup>, India, Finland, and Saudi Arabia, regulators report 5G traffic, but not 5G subscribers.
- The definition of what a 5G subscriber is differs.
- The definition of what 5G traffic is differs.

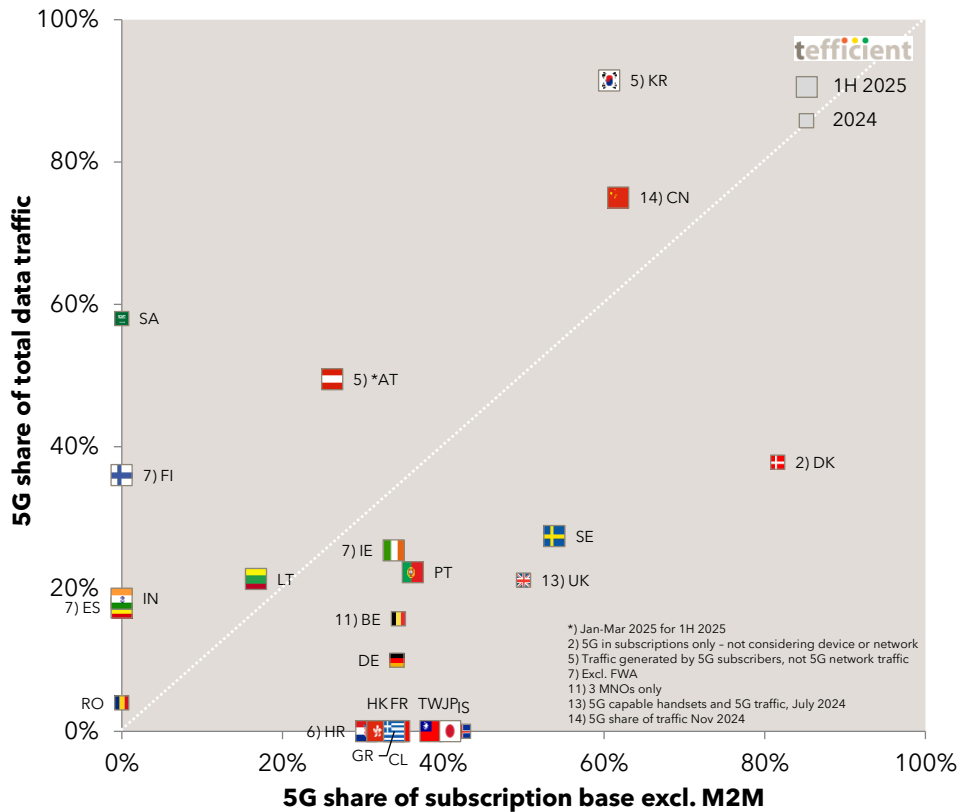


Figure 10. 5G share of total traffic vs. 5G share of subscription base

<sup>12</sup> For Romania, the 5G share of subscription base including M2M is available but since this report is excluding M2M, that share is not visualised here. We have deemed that M2M has no visible impact on the share of total data traffic (same assumption for India).

With these difficulties, it's hard to be firm on the conclusion on 5G, but Figure 10 isn't necessarily showing that 5G drives data traffic. There are a few countries above the white equilibrium line for which it is true – **Lithuania, Austria<sup>13</sup>, China, and South Korea** – but there are more countries below the line: Portugal, Germany, Belgium, Ireland, Sweden, the UK, and Denmark. If we compare to Figure 8 – the data-only graph – the difference is clear. Whereas data-only drives average data usage, 5G doesn't seem to.

South Korea, Austria, China, Austria, and Lithuania report disproportionately high 5G traffic.

Why not? One obvious explanation is **coverage** (or rather lack thereof). 5G subscribers with 5G devices need 5G coverage to generate 5G traffic. When 5G coverage is being rolled out further, the 5G share of traffic should increase. The quantum leap in speed and quality that 5G could offer comes through new, higher, spectrum bands (typically the C-band), though. Regrettably it doesn't propagate well into buildings from outdoor sites and since most of the mobile data traffic is consumed indoors, the lack of 5G C-band indoor coverage is a hinder for 5G's traffic dominance. Operators might have to level up on dedicated indoor solutions to get a disproportionately high share of traffic on 5G.

While that sounds both costly and slow, another option is to **target the FWA market using 5G**. The positions of **Austria, Lithuania**, and most likely **Saudi Arabia** in Figure 10 – where 5G's share of traffic is higher than 5G's share of subscriptions – could be a result of that. Since each FWA subscriber consumes so much more traffic than the average mobile data user, even a small base of 5G FWA customers will move the needle. Through stand-alone and slicing, 5G also offers the possibility to set monetisable thresholds for the speeds and quality of FWA.

Before closing this section, let's introduce a simpler version of Figure 10 which only shows the 5G share of traffic. It visualises how far the 5G journey has come in **South Korea and China**. But the high ranking of **Saudi Arabia** and **Austria<sup>12</sup>** also shows how important 5G FWA could be to drive the overall 5G traffic.

<sup>13</sup> The reported 5G traffic in Austria is the traffic generated by 5G *subscribers*, but not necessarily carried on 5G networks. The same applies to South Korea.

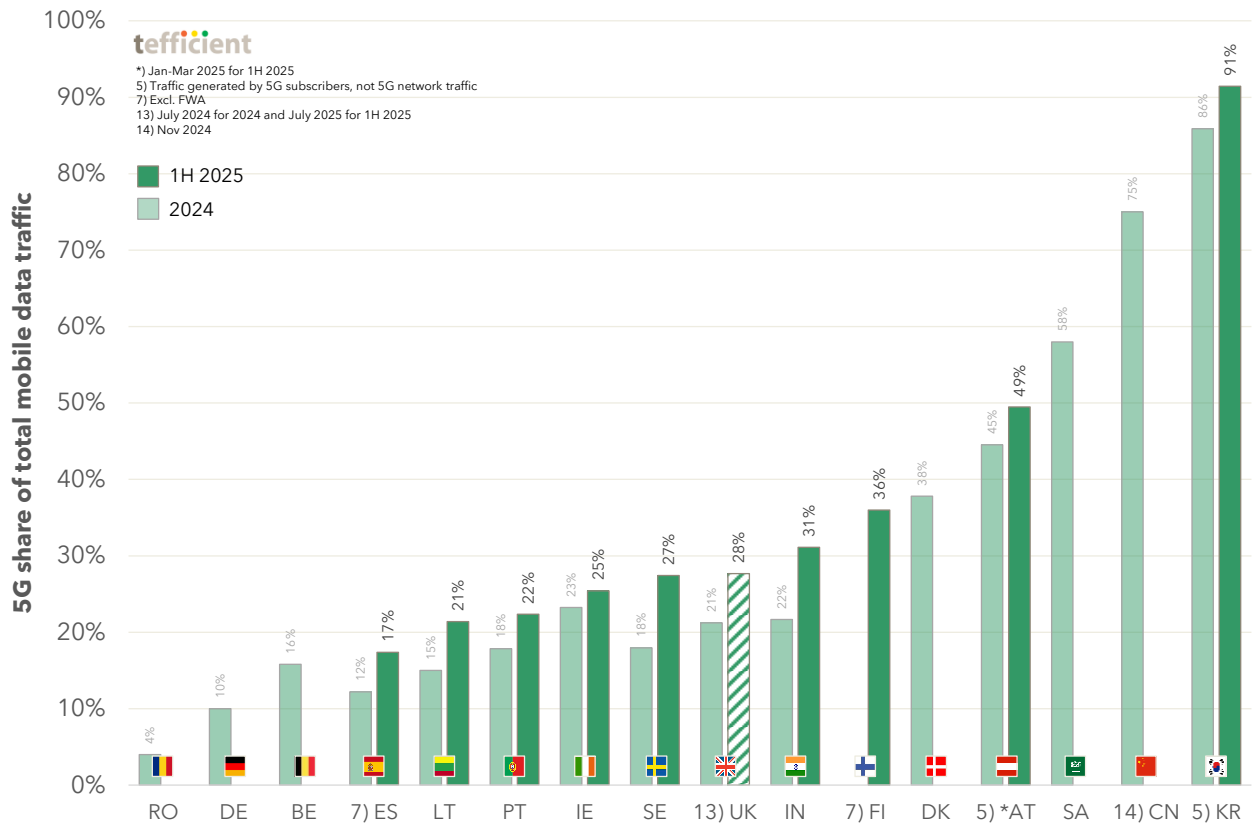


Figure 11. 5G share of total traffic - first half of 2025 (not dimmed) and full year 2024 (dimmed)

5G's proportion of total traffic in Europe is still lower than in Saudi Arabia, China, and South Korea.

Some European countries - Romania and Germany - struggle with 5G traffic take-up having achieved just 4% and 10% in 2024. Belgium was at 16% in 2024. Spain grew to 17% in the first half of 2026. Lithuania, Portugal, Ireland, Sweden, and the UK have in between 21% and 28%<sup>14</sup>. **India, Finland, and Denmark** are in the 30% to 40% range.

**Austria** had 49% in Q1 2025 but this share is the traffic generated by 5G subscriptions, not necessarily on 5G networks.

**Saudi Arabia** had 58%. **China's** 75% was stated for the month of November 2024 whereas **South Korea** leads in Figure 11 with 91% - but again this is the traffic generated by 5G subscriptions, not necessarily on 5G networks.

<sup>14</sup> We included the 28% value for the UK although it's for July 2025, i.e. later than the first half of 2025.

**Trend shift: The revenue per gigabyte increases here and there**

Most mobile operators in mature markets aren't attempting to monetise voice and SMS based on usage any longer; they have instead made these allowances unlimited and included them in a flat fee. This means that the last price-defining parameter for most mobile users is **data volume**. Even though more operators introduce unlimited propositions, these are often the last step in a tiered data plan<sup>15</sup> - which means that price still, essentially, is about data volume.

Figure 12 plots the *total* mobile service revenue per consumed gigabyte<sup>16</sup> against the average mobile data usage per subscription and month.

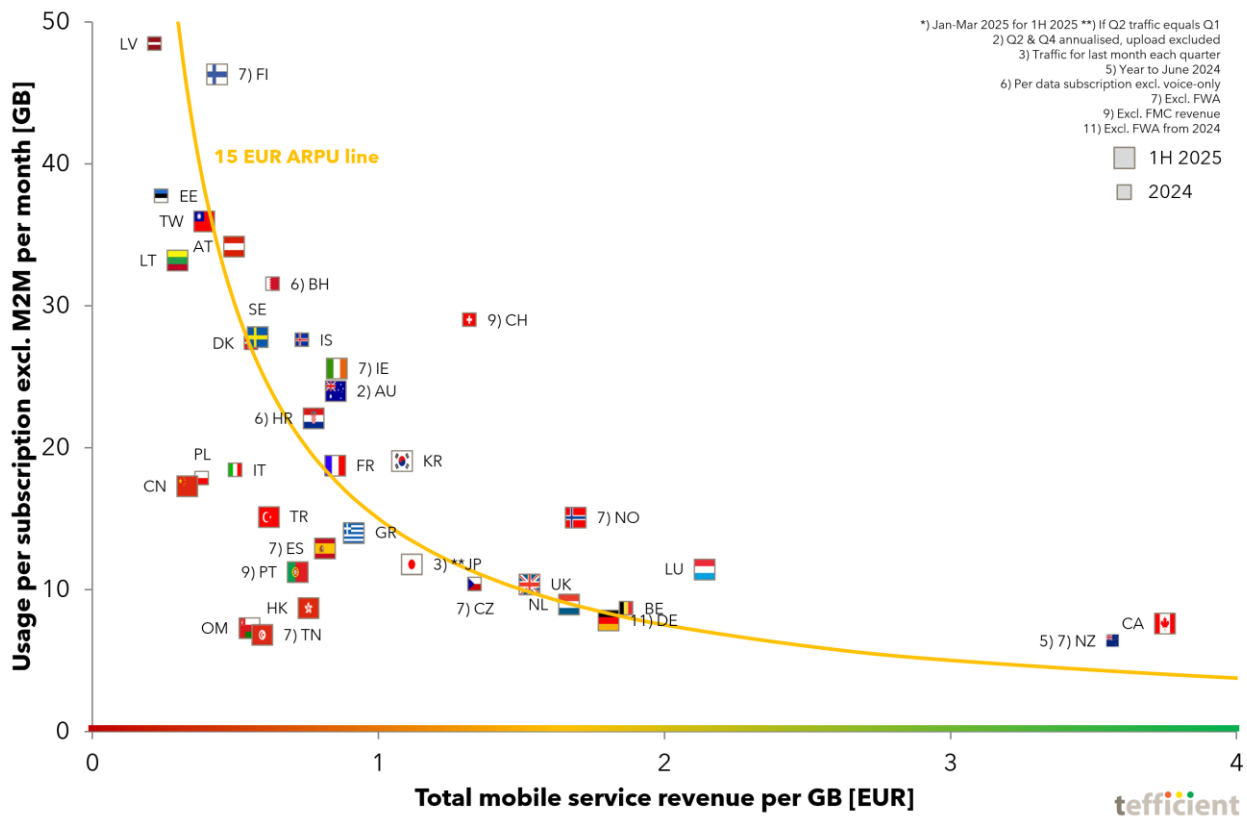


Figure 12. Mobile data usage vs. total mobile service revenue per consumed GB

The amber line shows where **15 EUR of ARPU** is earned. Countries below it had an ARPU lower than 15 EUR, countries above an ARPU higher than 15 EUR.

**Canada** holds the position where operators collectively have the highest total service revenue per consumed mobile GB. Only **New Zealand** is in the vicinity of Canada with an almost as high revenue.

<sup>15</sup> There are exceptions to this - where the price-defining parameters typically are data throughput or binding period instead.

<sup>16</sup> Attributing zero value to voice and messaging.

In the middle of the graph, there is a cluster of countries with relatively high revenue per GB: **Luxembourg, Belgium, Germany, Norway, the Netherlands, and the UK.** A true outlier is **Switzerland:** High mobile data usage despite relatively high revenue per GB.

It's important to point out that our analysis looks at what the mobile operator industry de facto makes on end-users, not what the best offer on the market currently is. Most users are on old price plans because they are still locked in by a contract - or because they have not bothered to find the best deal.

At the other end of the scale, we find the markets where operators get the lowest revenue per consumed gigabyte: **Latvia, Estonia, Lithuania, China, Poland, and Taiwan.**

Looking at Figure 12, we can conclude - as in all our previous editions of this analysis - that the key explanation to high mobile data usage is low effective revenue per gigabyte: **Bigger data buckets lead to lower revenue per GB - which, on the other hand, increases usage.** At least when customers can use those big buckets also within the data-only segment, see Figure 7.

Latvia's operators have the lowest total revenue per GB - Canada's operators the highest.

Operators have overall never had lower total service revenue per gigabyte than what they currently have - but it's no longer true for every market. In **Turkey, Finland, and Croatia** the revenue per gigabyte grew in the year to June 2025. Figure 13 shows the revenue development per GB for all markets.

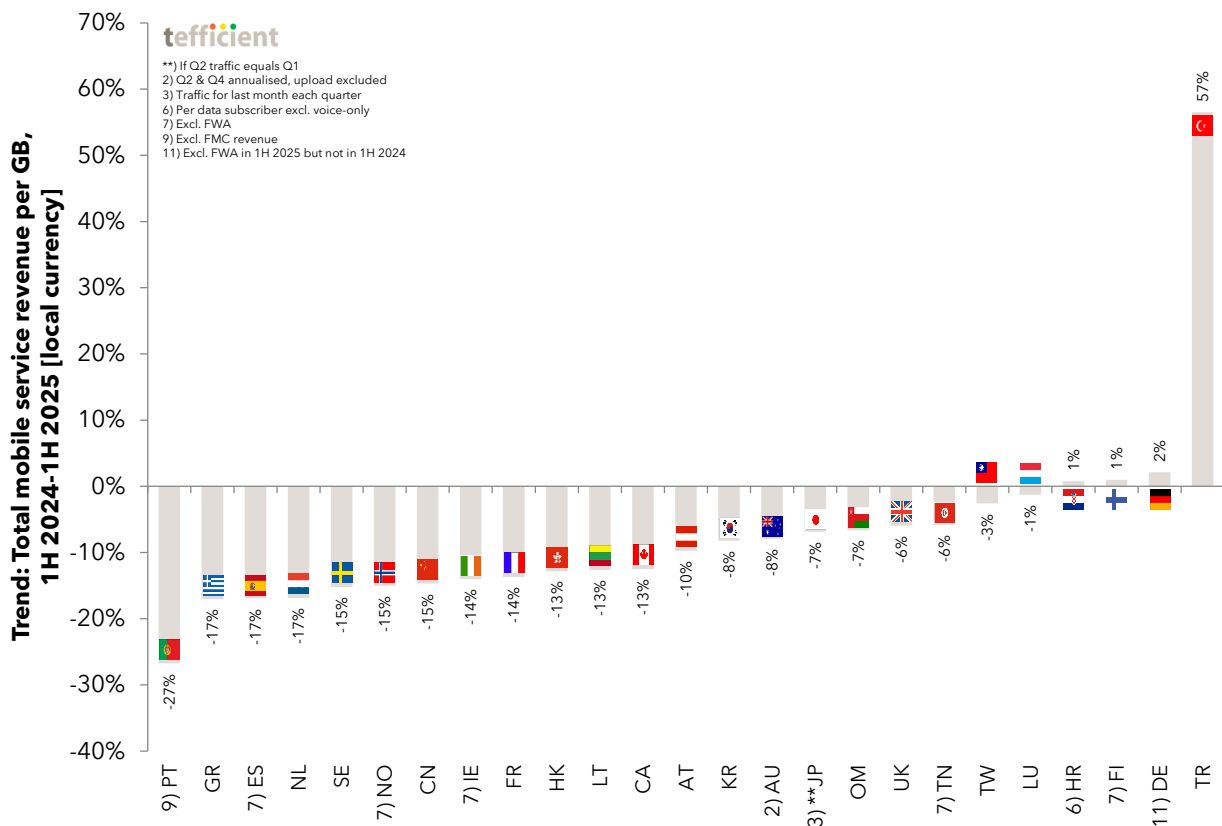


Figure 13. Development in total mobile service revenue per consumed GB - 1H 2024 to 1H 2025

The prerequisite to appear in Figure 13 is of course that the statistics are reported for both 1H 2024 and 1H 2025. Of these markets, **Portugal** had the fastest revenue erosion, 27%. **Greece, Spain** and the **Netherlands** follow with 17%.

The erosion rates are again slower than what we historically seen in this analysis. There are two reasons to this:

- 1) Slower growth in data usage,
- 2) Faster growth in mobile service revenue.

In **Turkey**, with its hyperinflation, the revenue per GB continued to increase - this time with **57%** - in local currency. But this time we have two additional markets with revenue growth per GB: **Finland** and **Croatia**, both with 1%. **Germany** had 2% revenue growth, but we believe this is attributable to FWA being excluded in 1H 2025 but not in 1H 2024.

### No correlation between data usage and ARPU

Figure 14 is a variant of the revenue per GB chart - it plots the usage against the average revenue per subscription, i.e. the ARPU.

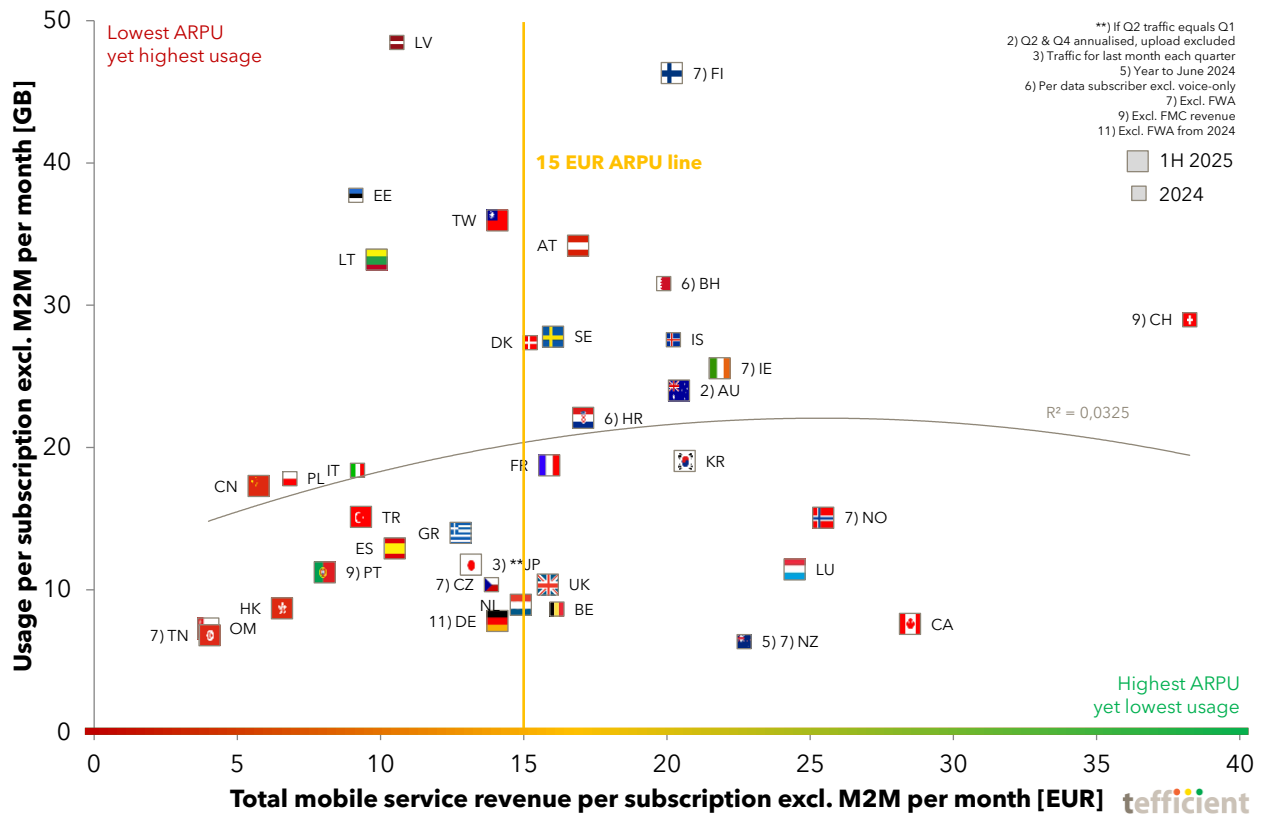


Figure 14. Mobile data usage vs. total mobile service revenue per subscription

**Switzerland** had the highest ARPU among our markets, but the data usage is at least high. **Canada** had the second highest ARPU among our markets, followed by **Norway**, **Luxembourg**, and **New Zealand**. These four countries have relatively low data usage despite good ARPU.

Operators in the countries to the upper left - **Latvia**, **Estonia**, **Lithuania**, **China**, and **Poland** - are generous with mobile data considering their ARPU. These countries form a nice imaginative trend line suggesting that operators could expect to get rewarded with higher ARPU as usage grows.

But that's regrettably not to overall trend: The adherence to the grey regression line is weak but it's not pointing in the north-easterly direction one would like to see - with more usage leading to higher ARPU.

## Dressing the Christmas tree based on ARPU development

Now to our Christmas tree graph which we think is our best data representation. It's the graph were we like to see the branches stretch to the right - since that means that the ARPU grew in the past year. That would demonstrate that the operators of a country have been able to monetise the growth in data usage.

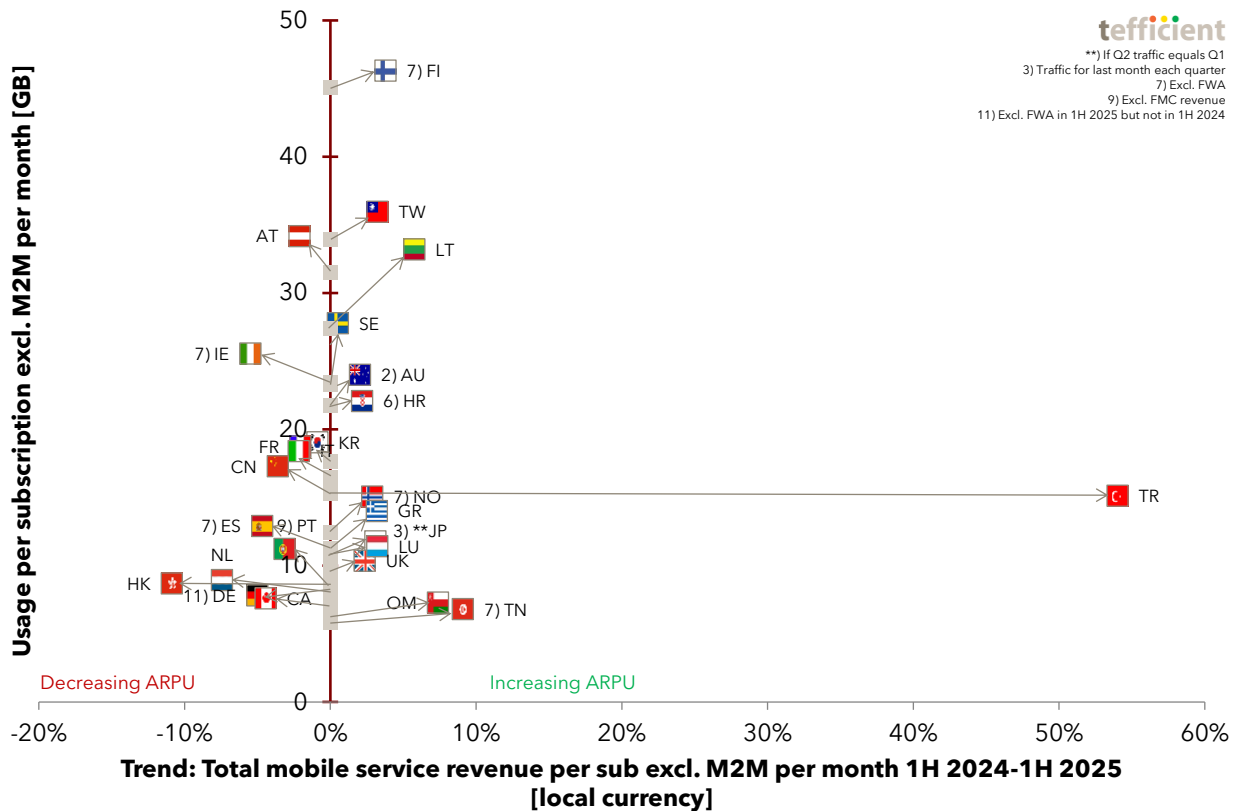


Figure 15. Development in mobile data usage vs. the development in ARPU - 1H 2024 to 1H 2025

The branches stretch right in only **14 of 26 markets**<sup>17</sup> (54%) which means that the weakened ARPU trend observed in our [previous edition](#) continued to soften. The winners are - from the top - **Finland, Taiwan, Lithuania, Sweden, Australia, Croatia, Turkey, Norway, Greece, Japan, Luxembourg**, the **UK, Oman**, and **Tunisia**.

In 12 markets (46%), the branches stretch left meaning that ARPU fell even though data usage typically grew. The ARPU erosion in **Hong Kong** was the fastest, 11%, followed by the **Netherlands** with 7%.

ARPU grew in just 14 of 26 markets although data usage grew in 24.

<sup>17</sup> The markets for which regulators/operators have reported the necessary underlying stats to date.

## Conclusion

In our country-level analysis of mobile data usage and revenues, **usage growth was observed in most - but not all - markets.**

**Saudi Arabia** led with 50.4 GB per average subscription, followed by **Latvia** with 48.5 GB and **Finland** with 46.3 GB. Data usage fell in **Qatar** and **Turkey**, while **Portugal** recorded the fastest growth at 32%. **Growth rates decelerated** in a majority of markets, but after the sharp slowdown from 2023 to 2024, usage growth rates largely stabilised.

Our analysis reveals a strong correlation between the share of **data-only** subscriptions and average data usage. **Finland, Lithuania, Austria, Poland,** and **Latvia** stand out as the global leaders in this segment. Austrian statistics show that mobile networks carried 43% of total data traffic in 1H 2025. In Finland, the previous leader, mobile's proportion decreased to 40%.

Efforts to correlate the share of **5G** subscriptions with 5G traffic share faced challenges due to limited data availability and inconsistent definitions across markets. Only **South Korea, China, Austria, and Lithuania** report disproportionately high 5G traffic. In other markets, lack of widespread 5G coverage indoors appears to be a key factor limiting its traffic contribution.

Regardless of technology generation, increased data-only penetration – particularly because of fixed-line substitution – can significantly boost data usage. However, a key enabler of this, and of high usage in general, is a low total revenue per gigabyte. Countries such as **Latvia, Estonia, Lithuania, China, Poland, and Taiwan** exemplify this, while **Canada and New Zealand** lie at the opposite end of the spectrum.

Despite varying usage levels, market ARPU does not consistently correlate with data consumption. **Canada, Norway, Luxembourg, and New Zealand** have higher ARPU levels, although data usage is low or moderate.

In this edition, only **14 of 26 markets achieved ARPU growth** alongside increased data usage. This marks a continuation of the weakening ARPU growth trend identified in our previous edition.