Short-form dominates video traffic

Extract from the Ericsson Mobility Report

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Social platform video accounts for the vast majority of smartphone video viewing, while video-on-demand services deliver higher bitrates and superior quality of experience (QoE) scores.

Key insights

- Social media-generated videos constitute 70–80 percent of all mobile video traffic viewed on smartphones, while streaming of video-on-demand services represents less than 10 percent, underscoring users' preference for short, engaging clips from social platforms.
- For short-form social-media videos, 5G provides faster startup and smoother playback compared to 4G, minimizing interruptions as users rapidly scroll.
- Professionally produced and optimized streaming services deliver higher bitrates and superior QoE scores on smartphones compared with social media video platforms.

Comparing downlink and uplink traffic across four European mobile networks shows that video still dominates downlink usage, while cloud storage and communication services generate relatively more uplink traffic.

Video dominates downlink, but not uplink traffic

Video represents the largest portion of mobile data traffic across all four networks, accounting for around 50 percent of mobile traffic. Downlink traffic consistently shows a high share for video, reaching up to 60 percent. The share of video in uplink traffic, however, varies between networks. This variation reflects differences in user behavior, such as content creation and live streaming activity.

Communication services (including messaging, VoIP and video calls) are more bi-directional than video streaming, and therefore they generate a higher proportion of uplink traffic compared to downlink across the four sampled networks – 73 percent downlink and 27 percent uplink. The share of uplink traffic for communication services across the sampled networks ranges from 13 percent to 23 percent, while the share of downlink traffic remains around 5 percent or lower. This disparity underscores the interactive and user-driven nature of these services, where frequent user-originated activities such as voice and video calls, conferencing and content uploads significantly contribute to uplink traffic.

Across the sampled networks, social networking downlink traffic varies considerably, ranging from about 2 percent to 13 percent. For uplink, social networking usually ranks as the third-largest traffic category share – after video and either communications services or cloud storage – contributing roughly 7 percent to 14 percent of uplink traffic.

Cloud storage services represent a substantially larger share of uplink traffic compared to downlink, highlighting active usage of cloud-based functions such as backups and file synchronization. Conversely, gaming, audio and software downloads consistently contribute less than 2 percent of both downlink and uplink traffic across all networks.

Smartphone users prefer short, dynamic videos

Across the four sampled European networks, a more detailed analysis of video traffic was performed, where video consumption of content from the most popular global service providers was grouped into two main categories:

- social media–generated video (YouTube, TikTok, Instagram, Facebook)
- global[1] video on-demand streaming (Netflix, Disney+, Amazon Prime, Apple TV)

Methodology

The application mix and share of traffic in the sampled networks might not represent the absolute shares of the total traffic, as some traffic could not be classified. For example, the absolute share of video traffic is presumably higher across all networks as part of it is included in the categories "Other" and "Social networking" (such as Instagram feeds, Reels and Stories). The analysis is based on one week of data collection.

The analysis shows that across the four European service providers, video traffic on smartphones is dominated by social media, far exceeding that of streaming video-on-demand services. For three of the service providers, social media video accounts for approximately 80 percent of all video traffic, while the fourth records nearly 70 percent. These results highlight smartphone users' clear preference for short, dynamic videos on social platforms.

YouTube – the dominant platform in terms of reach

Across the four European mobile service providers, YouTube consistently emerges as a leading video service by user share, with the share of mobile video users ranging from about 73 percent to nearly 99 percent. Almost every mobile video user consumes YouTube content, making it the dominant platform in terms of reach. In terms of traffic volume, it takes the clear lead in two networks with a 34 and 21 percent share, while in one network it shares the top position with Instagram, and in the fourth network it remains a major contributor despite a slightly lower user share.

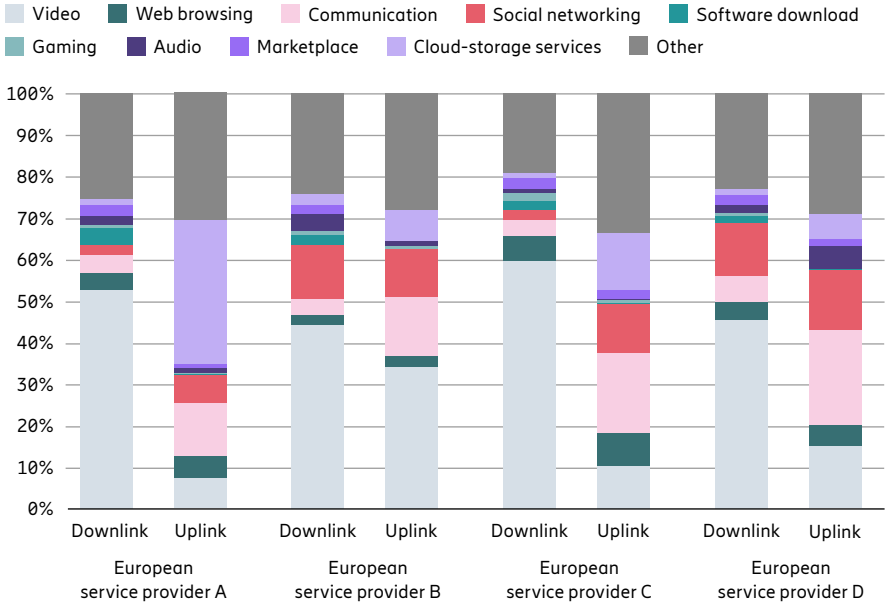
[1] To maintain analytical consistency, local TV streaming platforms and smaller content providers have been grouped under the "Other video" category due to regional and service provider-specific variations.

TikTok is the third most popular service by reach, with user share ranging from 52–59 percent and generating about 20–40 percent of the video traffic across the four service providers.

Instagram's user base varies across the four networks: It engages around 50 percent of users in two networks, while its adoption remains limited in the other two. In terms of traffic share, Instagram is most dominant in one network, accounting for about 20 percent of the total traffic.

Facebook is especially popular in two networks, engaging more than 75 percent of video users and accounting for over 20 percent of total video traffic in both networks. Across the other networks, Facebook still attracts a large share of users, but it generates a smaller proportion of traffic there. This pattern suggests that consumption is driven by autoplay content and short-form formats like Reels, which increase user counts but have shorter viewing times.

Figure 21: Share of traffic volume in downlink and uplink per application category



Note: "Other" includes unclassified traffic and traffic from services that have too small a share to be significant compared to the categorized segments, for example location services, email, speed tests, weather and web security. A large share of "Other" is presumably video traffic.

Mobile video-on-demand's role limited on smartphones

Streaming of global video-on-demand services accounts for less than 10 percent of total mobile video traffic consumed on smartphones across all sampled networks. Netflix consistently dominates this category, contributing between 3 and 6 percent of total video traffic on these networks. Other services like Disney+, Amazon Prime and Apple TV+ have a relatively small share, typically less than 1 percent. This limited usage on smartphones likely reflects users' preference to stream high-resolution content over Wi-Fi or fixed broadband connections and on larger devices such as tablets and PCs.

While traffic volumes and user behavior reveal a clear preference for short-form video content on social media platforms, the quality of the viewing experience is shaped by a range of technical factors. These include the capabilities of the smartphone itself, the encoding strategies of content providers and the performance of the underlying mobile network.

Smartphone video experience differs across models

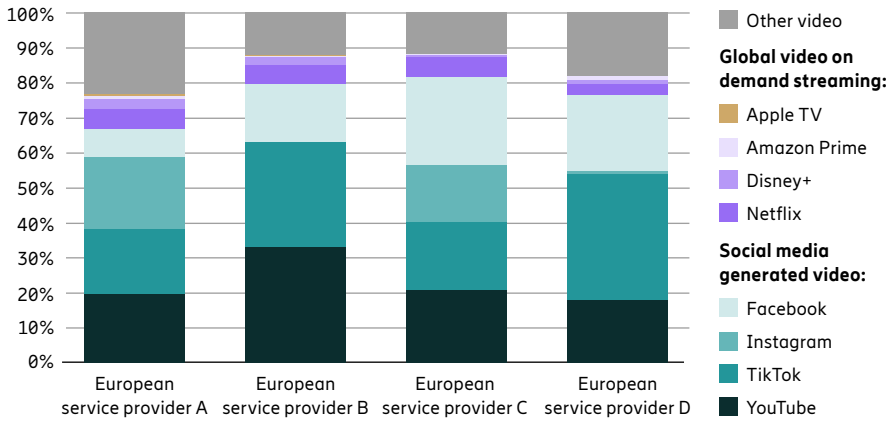
Mobile video experience on smartphones depends on several measurable factors, including intrinsic encoding quality (influenced by resolution, frame rate and codec) and dynamic quality effects such as time-to-content, rebuffering events and resolution adaptations to available channel capacity. It also depends on a specific smartphone model's capability. Calculated performance metrics across the sampled networks show that high-end flagship smartphones delivered the best streaming experience, with higher bitrates and QoE scores[2] of above 4.2, while entry-level models showed lower bitrates and QoE scores of 3.6–4.0. Overall, flagship smartphones deliver a superior video streaming experience due to better bitrate performance and optimization.

As expected, professionally produced and optimized streaming services like Netflix and Amazon Prime deliver higher bitrates and superior QoE scores compared with social media video platforms. Notably, Instagram achieves unusually high QoE scores despite lower bitrates, suggesting particularly effective adaptation and encoding strategies that preserve perceived quality under constrained network conditions.

5G enhances the streaming and scrolling experience

Across all four networks, 5G consistently delivers an improved video streaming experience compared with 4G.
The enhancement is noticeable for long-form, high-quality content on video-on-demand platforms, where higher bitrates, shorter stall times and better QoE make streaming smoother.
For short-form, social-media videos, 5G provides faster startup and smoother playback, minimizing interruptions as users rapidly scroll. In both cases, the upgrade to 5G results in a more responsive and reliable viewing experience.

Figure 22: Share of video traffic per video service provider



Note: To maintain analytical consistency, local TV streaming platforms and smaller content providers have been grouped under the "Other video" category due to regional and service provider-specific variations.

[2] Reported QoE values are estimates, calculated from video models using bitrate, resolution, stalls and video length, and may be less precise for encrypted traffic.

About Ericsson

Ericsson's high-performing networks provide connectivity for billions of people every day. For nearly 150 years, we've been pioneers in creating technology for communication. We offer mobile communication and connectivity solutions for service providers and enterprises. Together with our customers and partners, we make the digital world of tomorrow a reality.

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