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A new study from global telecom data provider Tarifica finds that although Unlimited mobile plans dominate operator marketing, the structure of most postpaid mobile portfolios continues to revolve around a relatively small set of capped data tiers that shape how operators compete for customers.

The study, based on data from Tarifica's Telecom Pricing Intelligence Platform (TPIP), analyzed 2,415 standard consumer postpaid mobile plans offered across 46 countries in Q4 2025. The analysis reveals that beneath the apparent diversity of mobile data allowances worldwide lies a consistent commercial framework built around a small number of widely adopted data tiers.

One of the study's key findings is that Unlimited plans, despite their visibility in marketing campaigns, represent a minority of global offers. The analysis identified 527 Unlimited plans in the dataset, accounting for approximately 21.8% of all postpaid propositions. In other words, nearly four out of five postpaid plans worldwide still rely on capped data allowances.

"Unlimited plans attract the headlines, but they do not represent the structural core of most operator portfolios," said Soichi Nakajima, Tarifica's Vice President of Data and Analysis. "Operators typically use Unlimited as a premium anchor that frames value perception and signals network strength. Most day-to-day competitive activity still occurs across capped data tiers."

When capped plans are examined more closely, clear structural alignment emerges across markets. Five allowances (10 GB, 20 GB, 30 GB, 50 GB, and 100 GB) dominate globally. Together, these five tiers account for nearly a quarter of all postpaid plans included in the study.

This convergence suggests that operators across very different markets are independently arriving at similar portfolio structures. These tiers effectively form a global "data ladder" that simplifies product portfolios while guiding customers through predictable upgrade paths.

Among capped plans, 100 GB has emerged as the most common upper tier. What was once considered a premium allowance has quietly become the new benchmark for higher-end capped plans, reflecting sustained growth in video streaming, social media use, and other data-intensive applications.

"Across the countries analyzed in the study, we see operators converging on a similar commercial ladder built around the 10 to 100 GB range," Nakajima said. "These tiers simplify customer comparison and create natural upgrade paths that help operators manage pricing strategy and portfolio migration."

Beyond this core ladder, the market becomes far more fragmented. More than 50% of plans fall outside the dominant tiers, forming a long tail of highly diverse data allowances. This segment includes plans

with less than 10 GB, irregular mid-tier allowances such as 25 or 60 GB, and extremely large capped plans reaching multiple terabytes.

In total, the fragmented segment contains more than 100 distinct data allowances, most of which appear only once or twice across the entire dataset. According to the study, these plans often reflect local regulatory conditions, legacy plans that remain technically active, or market-specific experimentation rather than a consistent portfolio strategy.

Taken together, the findings reveal a three-layer structure in global postpaid data portfolios. The core commercial ladder of 10 to 100 GB represents the primary zone of competitive activity. Above it, Unlimited plans function largely as premium positioning tools. Outside this core sits a fragmented collection of irregular tiers shaped primarily by local and legacy factors.

The study concludes that recognizing this structure provides a clearer view of how operators actually compete. Although markets may appear highly differentiated, much of the strategic activity takes place within a narrow range of standardized data tiers centered on the 10 to 100 GB ladder.

To read the full analysis, please visit Tarifica's website.