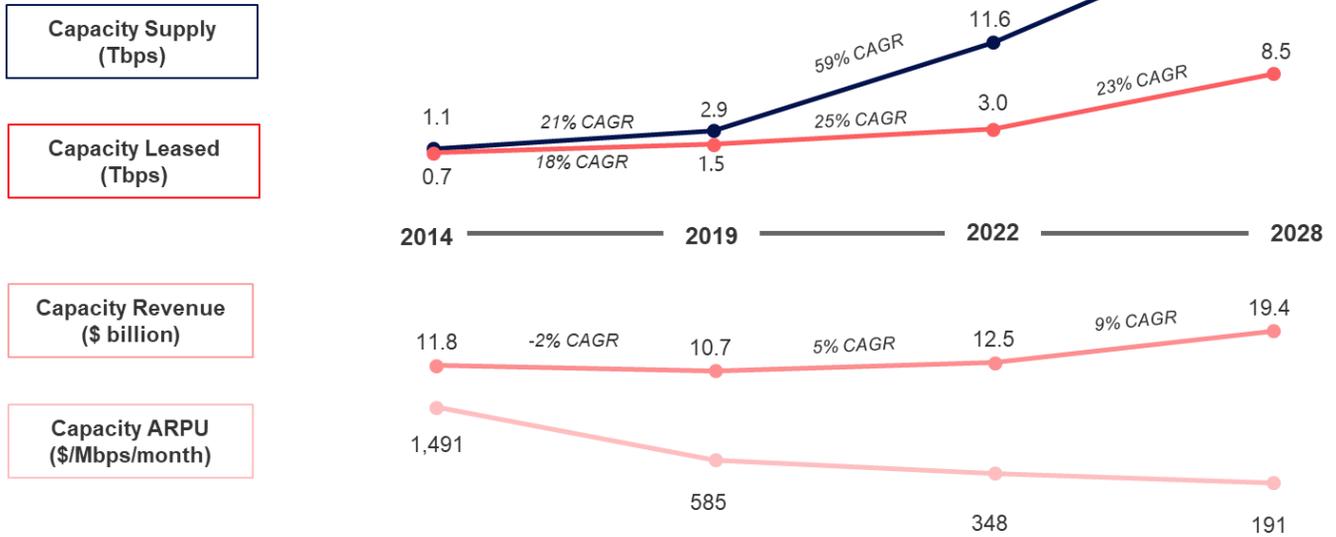




The essential tool for business planning and investment decisions in the satellite industry

Satellite Connectivity and Video Markets Survey

SATELLITE COMMUNICATIONS MARKET FORECAST SUMMARY



Euroconsult, the world’s leading authority on space and satellite-based applications, released its flagship research, which predicts the satellite communications market will grow to \$19.4 billion by 2028. Following a decline that began in 2014, the research forecasts a return to revenue growth beginning in 2020, driven by demand for broadband applications, including rural connectivity, in-flight communications, as well as cellular backhaul.

“A confluence of market and technology forces have contributed to a period of great turbulence in the satellite industry,” said Nathan de Ruiters, Managing Director of Euroconsult Canada and Editor of the Research. Traffic over satellite continued to increase to nearly 1.3 Tbps in 2018, however, this did not drive revenue growth because of reductions in capacity pricing across all regions. “While headwinds continue to persist in 2019, it is encouraging that our findings point to a return to revenue growth next year”.

The satellite communications market is heading towards an inflection point in 2021, where wholesale revenue for voice & data applications will equal traditional broadcast revenues. Post 2022, the satcom market should enter an era of market expansion, driven by anticipated demand elasticity in price-sensitive verticals, such as consumer broadband access, Wi-Fi hotspots, inflight connectivity and cellular backhaul. The research examines the forces impacting the satellite industry in recent years including changes to business models, user requirements, technologies and the competitive landscape. New to this year’s edition of the Satellite Connectivity and Video Markets Survey, the report differentiates between traffic flowing over geostationary (GEO) satellites versus Low Earth Orbit (LEO) constellations and it includes market intelligence on capacity pricing and impact on revenues for each class of service. Findings are illustrated by insightful infographics for a quick snapshot of how market forces are changing and forecast growth trends.



ABOUT SATELLITE CONNECTIVITY AND VIDEO MARKETS SURVEY

PREVIOUSLY SATELLITE COMMUNICATION & BROADCASTING MARKETS SURVEY

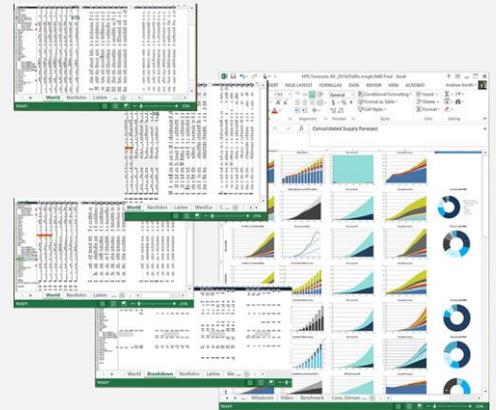
This comprehensive **market survey** is an essential tool for business planning and investment decisions. In addition to an examination of strategic issues, it breaks down forecasts **by region, orbit class, and applications**. It includes in-depth analyses of **six market segments, 13 regions worldwide**, and quantifies data on **the past five years** for historical trends as well as projections **for the coming ten years**.

EXTENSIVE FIGURES & ANALYSIS FOR THE COMING DECADE

All Euroconsult reports have, at their core, data derived from over 30 years of tracking all levels of the satellite/space value chain. To this we add dozens of dedicated industry interviews each year, along with the continual refinement of our data models, and the collection and interpretation of company press releases and financial filings. Our consultants have decades of experience interpreting and analyzing our proprietary databases in light of the broader value chain.

When you purchase research from Euroconsult, you receive thousands of data points and the expert interpretation of what this means for specific verticals and sectors of the satellite value chain, including forecasts based on years of data and highly refined models.

This report contains Extensive Excel budget database, with thousands of data points, covering annual space budgets from 1990 to 2028.



THE REPORT INCLUDES:

- ✓ Strategic issues and forecast containing market drivers, structural changes and consolidated forecasts of the FSS market
- ✓ Application analysis and forecasts
- ✓ 13 world regions: North America, Latin America, Western Europe, Central Eastern Europe, Russia/CIS, Middle East & North Africa, Sub Saharan Africa, South Asia, North East Asia, China area, South East Asia, Oceania
- ✓ Extensive Excel database, with thousands of data points
- ✓ Two time periods of reference: 2009-2018 for historical trends and 2019-2028 for forecasts

A MUST READ FOR:

- ✓ Administrations & Space Agencies
- ✓ Satellite & Equipment Manufacturers
- ✓ Satellite Operators
- ✓ Launch Service Providers
- ✓ Investors & Financial Institutions

KEY TRENDS, DRIVERS & FORECASTS FOR SATELLITE CONNECTIVITY AND VIDEO MARKET SURVEY

Satellite Connectivity and Video Markets Survey is a reference for satellite-based players & leaders around the globe. The report provides critical information for business and strategic planning in the connectivity and video market, including:

- ✓ Forecasts are presented by region, system type (regular, GEO HTS, NGSO HTS) and service applications.
- ✓ Detailed analysis of market trends and capacity forecasts of 6 market segments: Video distribution & contribution, Cellular Backhaul & Trunking, Enterprise networks, Mobility, Milsatcom, Consumer broadband



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