

Worldwide Cellular and Broadcast Mobile TV

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Executive Summary

It has been a rough few years for digital, mobile, pay-TV broadcast deployments, as a number of plans never came to fruition and several of those that were launched have been shut down. Free-to-air digital mobile TV has been more successful in attracting viewers. Analog mobile TV receivers have shipped widely in developing countries where analog TV signals will be on the air for the next few years.

Cellular mobile TV services, often delivered over 3G networks, have steadily increased. 3G growth is driven by the need for capacity generated by new applications and services, of which mobile TV is a part. 3G revenue, both in build-outs of networks and equipment, was less in 2009 than expected, due to operators cutting back in the face of a global recession. In-Stat sees a recovery in 2010, and in some parts of the world, a strong recovery. This is partially due to economic recovery, but more to the new numbers of mobile subscribers, the use of the iPhone and other smartphones for data activities, such as email, downloads from the Internet, and gaming to name a few.

Figure 1 shows In-Stat's forecast for total mobile TV subscribers and viewers, segmented by analog broadcast viewers, digital broadcast subscribers/viewers, and cellular subscribers. In-Stat believes that the largest number of mobile TV subscribers/viewers will come from digital broadcast. This will be followed in numbers by analog broadcast viewers. Cellular mobile TV subscribers will be fewer in number, but will still generate over \$XX billion in subscription revenue by 2014.

Figure 1. Worldwide Mobile TV Subscribers and Viewers (in Thousands)

XX

HIGHLIGHTS

- Global 3G network development is driven by data services, such as social networking and texting. Mobile TV stands to leverage this demand.
- Asia/Pacific will drive mobile TV subscriptions, primarily in India and China.
- Analog mobile TV broadcasts will continue to grow steadily for the next decade in Asia/Pacific, Africa, and South America.

Report Summary

This report covers the worldwide market for mobile TV services. As more handsets have the capability to support video, networks gain more bandwidth capacity, and content becomes available, there will be an increase in mobile TV services and revenues.

This report includes:

- Analog viewers and subscribers forecast by standard
- Analog viewer forecast by geographic region
- 3G mobile TV subscriptions by region
- 3G mobile TV subscription revenue forecast by region
- Regions include North America, Europe, Asia/Pacific, Latin America and Middle East/Africa

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Methodology

Primary research was conducted through briefings and interviews with major technology vendors and operators, such as Siano, DIBcom, Telegent, MobiTV, Qualcomm, AT&T, Alcatel Lucent, Harris, OMVC, Newport Media, Envivio, and others.

Secondary research was conducted using vendor websites, press releases, articles in trade journals, and industry websites. Annual Reports of major vendors, telecom operators, and handset manufacturers were reviewed and analyzed. World Bank and the International Telecommunication Union's research were also analyzed.

The numbers in this report are calculated at a higher precision than shown. As a result, some of the numbers may not calculate exactly due to rounding.

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- #IN0904616WHT *Analog Mobile TV: The World's Most Widely Available Option for Mobile TV*,
August 2009
<http://www.instat.com/promos/09/mobiletv.asp>