

World Connecting at Broadband Speeds, More Mobile in 2010

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Executive Summary

Global broadband subscribers continue to grow fast, with mobile wireless growth exceeding our expectations. We estimate that during calendar year 2010, an average of XX million new broadband subscribers signed up for service each month. By year-end 2010, In-Stat is projecting that the worldwide total of broadband service subscribers will reach XX million.

DSL subscribers now account for XX% of global broadband connections. Mobile wireless broadband, on the other hand, is the second largest access technology with XX% of total subscribers. Cable modem service is next with XX%. Other access technologies, such as fiber-to-the-home (FTTH) service and fixed wireless broadband, are also attracting millions of new subscribers each year.

The primary market driver responsible for the growth of broadband subscribers continues to be the desire to access the Internet with a high-speed connection. The growing popularity of bandwidth-intensive applications, such as watching online video, using IP-based telephony services, and downloading music files, is directly spurring demand for higher-speed Internet connections.

HIGHLIGHTS

- As of December 2010, there are XX million worldwide broadband subscribers, an increase of XX million over the year-end 2009 subscriber total.
- DSL, mobile wireless, and cable modem service are the leading access technologies, providing XX% of worldwide broadband connections.

Figure 1. Worldwide Broadband Subscribers, 2009–2014 (in Millions)

XX

Looking into the future, In-Stat expects worldwide broadband subscribers to continue to grow rapidly. We are forecasting that XX million broadband subscribers will have signed up for broadband service in 2010. By 2014, we are projecting that the number of global broadband subscribers will surpass XX billion.

Other key findings in this report include:

- Annual broadband subscriber growth in 2010 is on track to be XX%, and is projected to be XX% in 2011.
- Broadband subscriber growth in the US has remained robust. In 2010, the US is on track to add over XX million new broadband subscribers. By year-end 2010, the US will have over XX million broadband subscribers in the country.
- Total worldwide DSL subscribers will reach XX million at year-end 2010, fueled primarily by strong demand for DSL service in the Asia/Pacific region.
- Total worldwide cable modem service subscribers will reach XX million at year-end 2010. Slightly less than half of the world's cable modem subscribers are located in North America.

- Mobile wireless broadband subscribers continue to grow rapidly as mobile telephone service providers roll out 3G and 4G services. At year-end 2010, mobile wireless broadband subscribers are on track to reach XX million, up from XX million at the end of 2009.
- FTTH service subscribers are also growing significantly. At year-end 2010, global FTTH subscribers are projected to reach XX million, an increase of XX million over the preceding twelve months. Approximately XX% of the world's FTTH subscribers reside in the Asia/Pacific region.
- Over the next few years, In-Stat expects to see an increasing number of households with multiple broadband connections. These multiple connection households will commonly have a wired broadband access technology, like DSL or cable modem service, along with a mobile wireless broadband connection.

Report Summary

Global broadband subscribers continue to grow, with mobile wireless in particular gaining momentum. During calendar year 2010, an average of XX million new broadband subscribers signed up for service each month. By year-end 2010, In-Stat is projecting that the worldwide total of broadband service subscribers will reach XX million.

The primary market driver responsible for the growth of broadband subscribers continues to be the desire to access the Internet with a high-speed connection. The growing popularity of bandwidth-intensive applications, such as watching online video, using IP-based telephony services, and downloading music files, is directly spurring demand for higher-speed Internet connections.

The report provides historical subscriber data for broadband services and forecasts worldwide broadband subscribers through 2014. In addition, it provides regional subscriber forecasts for cable modem service, DSL service, mobile wireless broadband service, fixed wireless broadband service, and FTTH households. It also provides worldwide subscriber forecasts for satellite broadband service, broadband over powerline service, and other access technologies.

What Questions Does This Report Answer?

- How big is the worldwide base of broadband subscribers/end-users?
- What is the breakdown of broadband subscribers/end-users by access technology (DSL, mobile wireless, cable modem, FTTH, etc.)?
- What is the segmentation by geographic region?
- How big is the US base of broadband subscribers/end-users?
- Why is demand for broadband services growing?
- How will the market grow in the near-future?

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Methodology

This report covers the market for worldwide broadband services. It examines leading market drivers for broadband services and discusses the most widely available broadband access technologies.

The report provides historical subscriber data for broadband services and forecasts worldwide broadband subscribers through 2014. In addition, it provides regional subscriber forecasts for cable modem service, DSL service, mobile wireless broadband service, fixed wireless broadband service, and FTTH households. It also provides worldwide subscriber forecasts for satellite broadband service, broadband over powerline service, and other access technologies.

Data collection and analysis for this report included primary and secondary research about broadband services and products. Data was also collected from conferences, meetings, and attendance at telecommunications and consumer electronics trade shows.

Primary research included financial statements, industry association (e.g., Arcep in France, Bundesnetzagentur in Germany, FTTH regional councils, SIA, etc.) publications, and electronic mail conversations with broadband equipment manufacturers, broadband service providers, and other communications consultants. Secondary research included detailed analysis of the worldwide market demand for high-speed data services. It also entailed examining existing broadband service packages and researching the product development trends surrounding emerging broadband access technologies like WiMAX, LTE, and BPL services. To accomplish this, we made extensive use of public documents available on the Internet (e.g., financial statements, press releases, and news articles).

Information was also collected from In-Stat's Multimedia Broadband Services, Multimedia Broadband Infrastructure, Connected Digital Home, and Mobile Internet analysts.

Related In-Stat Reports

- #IN1004645BM *2Q10 Broadband CPE Tracker: By Region, Product, Technology, and Vendor*, October 2010
<http://www.instat.com/catalog/mmcatalogue.asp?id=99#IN1004645BM>
- #IN1004669MBS *US Residential Broadband Speeds Accelerate*, February 2010
<http://www.instat.com/catalog/mmcatalogue.asp?id=99#IN1004669MBS>
- #IN1004671MBS *Cable's Triple Play: Worldwide Video, Voice, and High-Speed Data Subscribers*, November 2010
<http://www.instat.com/catalog/mmcatalogue.asp?id=288#IN1004671MBS>
- #IN1004852WBB *The State of the LTE Market: CAPEX, Deployments, Subscribers, and Services*, November 2010
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<http://www.instat.com/catalog/wcatalogue.asp?id=281#IN1004784WBB>
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<http://www.instat.com/catalog/dbcatalogue.asp?id=160#IN1004774WL>
- #IN0904631RC *Home Network Technology & Connectivity Use: Ethernet, 802.11, Coax, and Powerline*, September 2009
<http://www.instat.com/catalog/mmcatalogue.asp?id=99#IN0904631RC>