Euroconsult

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

Satellite Connectivity and Video Market

2020 edition

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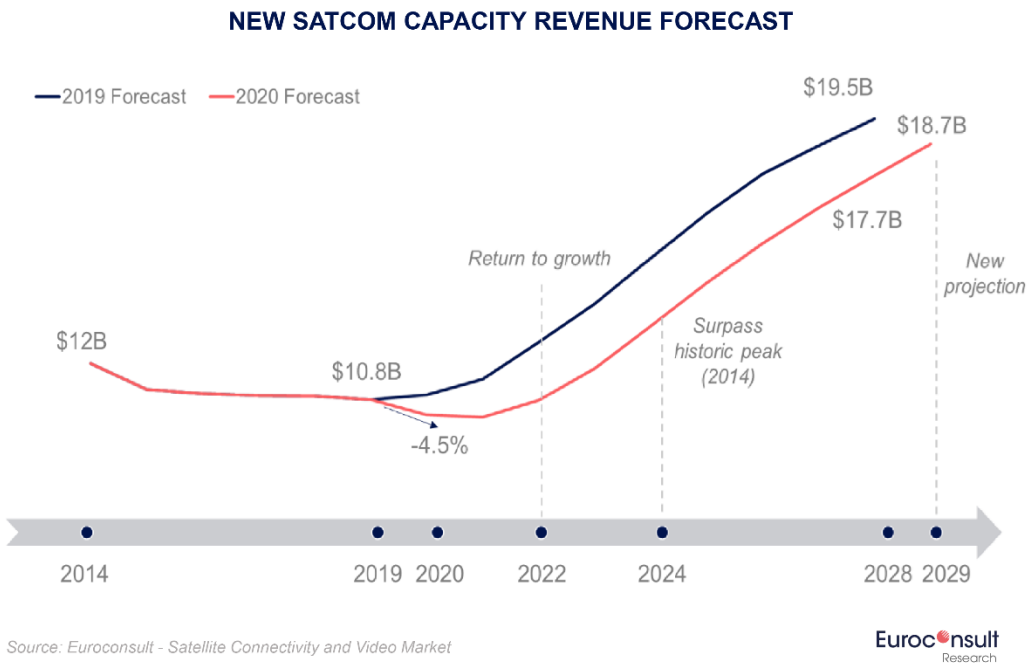
COVID-19 IMPACT ON SATELLITE CONNECTIVITY AND VIDEO MARKET DELAYS RETURN TO GROWTH



In its research, "Satellite Connectivity and Video Market," Euroconsult revised its forecast to account for the impact of COVID-19. The pandemic has deeply impacted maritime and in-flight connectivity demand, and to a lesser extent other segments such as enterprise networks. It remains to be seen how long those markets will take to recover.

Long-term market drivers for satellite connectivity remain strong and before the pandemic the market was starting to show signs of recovery from the major market price reset. However, due to COVID-19's impact on bandwidth consumption by cruise ships, commercial airlines, and the energy sector, return to growth previously forecast to begin in 2020 is now unlikely until 2022. According to Euroconsult's forecast, the satellite and connectivity market is now expected to surpass its historic revenue peak by 2024 and will become an $18.7 billion market by 2029.

Not all market segments have been negatively impacted by COVID-19. Consumer broadband saw growth in North America following the pandemic, with existing subscribers shifting to higher value plans and overall growth in subscriber base. Nonetheless, temporary supply chain issues have caused delays in new project rollouts in most market segments. Despite the short-term headwinds caused by the pandemic, it is expected that underlying market drivers will prevail, enabling long-term growth.

While market erosion since 2014 was mostly due to oversupply in some regions and the impact of high throughput satellites (HTS), the video market has also experienced marked changes. Whereas video distribution was previously the main driver of satellite revenue, by 2022 wholesale revenue for data applications is projected to surpass video applications. By 2029, data market revenues are expected to represent nearly 80 percent of the satellite connectivity market value.

ABOUT SATELLITE CONNECTIVITY AND VIDEO MARKET

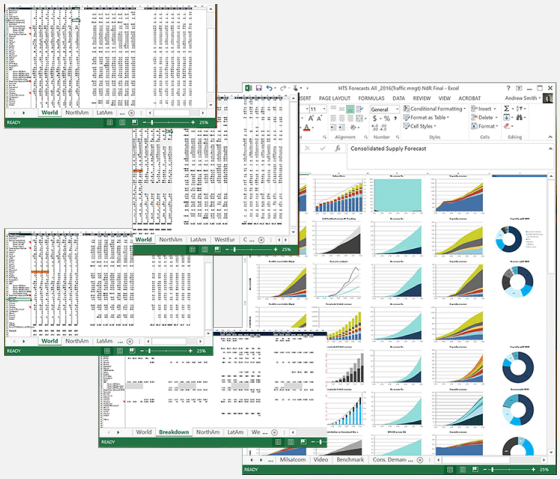
THE ESSENTIAL TOOL FOR BUSINESS PLANNING AND INVESTMENT DECISIONS IN THE SATELLITE INDUSTRY

An essential tool for operators, service providers, suppliers, manufacturers, launchers, and investors, the "*Satellite Connectivity and Video Market*" research – now in its 27th edition – provides an in-depth analysis of the conditions driving demand by market segment. With both a qualitative and quantitative perspective, it breaks down demand by region, application, and system type. The report includes historic numbers for capacity supply, capacity leased, capacity revenue, and the cost of capacity per unit, as well as a ten-year projection of these numbers in the future.

EXTENSIVE FIGURES & ANALYSIS FOR THE COMING DECADE

All Euroconsult research programs 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.

The research from Euroconsult contains thousands of data points and 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.



RESEARCH HIGHLIGHTS:

- ✓ Global satellite capacity supply is headed towards a dramatic increase
- ✓ ICT transformation, cloud applications & government programs, should play a big role in the development of the market, notably with PPPs and universal access policies.
- ✓ All regions should experience growth over the next decade, except for highly mature Northeast Asian market
- ✓ All the voice & data verticals are expected to grow in the next ten years (demand elasticity in price-sensitive verticals large volume commitments on the next-generation satellites)

APPLICATION ANALYSIS & FORECAST MARKET SEGMENTS:

- ✓ Video distribution & contribution
- ✓ Cellular Backhaul & Trunking
- ✓ Enterprise networks
- ✓ Mobility
- ✓ MILSATCOM
- ✓ Consumer broadband

STRATEGIC ISSUES:

- ✓ Market drivers
- ✓ Structural changes
- ✓ Consolidated forecasts of the FSS market

FORECAST:

- ✓ System type (regular, GEO HTS, NGSO HTS)
- ✓ Service application
- ✓ Region:

- *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*

A MUST READ FOR:

- ✓ Satellite operators
- ✓ Manufacturers
- ✓ Banks & investors
- ✓ Satellite service providers
- ✓ Space agencies

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