

United States Telecommunications Report Q2 2016

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Abstracts

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BMI View: The strong mobile market competition introduced by T-Mobile led to the cannibalisation of its competitors' customer bases, rather than contributing to further expansion in the number of basic phone users. Meanwhile, underlying market growth has come from connected devices, with the proliferation of smart homes and connected cars just the start of that particular market. In the wireline services sector, voice and TV continue to be under pressure, with the main growth driver being broadband and, especially, fibre broadband, underpinned by growing demand for heavy-data services. Regulatory decisions, such as the FCC changing its broadband definition to start at 25Mbps and the development of the Connected America Fund, will also drive broadband market growth, as operators look to offer higher speeds to customers.

Latest Updates & Industry Developments

The US mobile market saw the addition of 13.35mn mobile customers in 2015. Despite being a relatively mature market, mobile growth has still not stalled, averaging 3.9% compound annual growth rate over the year up to December 2015. We forecast slow but steady growth in mobile subscriptions to 2020, with the market set to reach 377.63mn subscriptions.

We envisage the number of 3G/4G subscribers rising to over 307mn in 2020, equivalent to over 81% of the total mobile market. Network operators have concentrated on expanding the reach of 4G services across the country, launching in new markets on a regular basis.

In February 2016 AT&T unveiled its '5G Roadmap' which included the start of trials in 2016. According to AT&T technologies such as millimetre waves,

network function virtualization (NFV), and softwaredefined networking (SDN) will be among the key ingredients for future 5G experiences.

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