

# Mobile Video Adaptation & Delivery 2013 – 2016

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## Abstracts

Purging the Fear of Tier 2/ Tier 1 Operators and Device Makers to Invest in Mobile Video/Pay TV Services by Strategical Guidelines for Seamless Adaptation & Delivery Towards Maximising ARPUs, with Forecasts for 2013 - 2016

An accurate study of the present and the expected face of the telecom market based on detailed research by our experts has been supported by true data extracted from the grass root levels. This study is a conclusive report based on interviews, data mining techniques, in depth analysis, scrutiny of factual data and possible innovative propositions that could equip an entity to tackle the ongoing advancements in the industry.

## Executive Summary

Mobile video & TV services have been around for almost over a decade...and yet mobile network operators haven't been able to cash in on these services. Why? Is it the fear they harbour against the required network upgrades and CAPEX associated with it or have they simply shut their eyes towards the mammoth revenue opportunities possible via mobile video/ mobile TV services? The aim of our first research offering of 2012 is to shatter the hesitation of operators, particularly tier 2 and greenfield operators who are at the toddler stage in telecoms towards these services and assist them in ensuring their ARPUs are on an upward swing for the next 5 years – for the time has come when you simply can't afford to rely on conventional mobile data offerings to your subscribers and risk being snuffed out by competitors unless you adapt to mobile video services and commence seamless, top quality video delivery on mobile devices to your customers.

## As a Mobile Network Operator you must ask yourself:

a) Are you having a hard time in network management for delivering seamless quality

mobile video & TV services?

- b) Have you thought of delving your operations in unserved/ underserved markets, globally?
- c) Are you at a loss as to selecting the most profitable business partnerships vis-à-vis mobile video and TV services?
- d) Does choosing the most appropriate business and pricing model for your mobile video services becoming an ongoing struggle for you?
- e) Are you confused as to whether your mobile video services roadmap correct?
- f) Are you paying enough attention on consumer/ devices segmentation?
- g) Is managing data traffic becoming an increasingly tough task for you?
- h) Are regulatory measures hindering your business prospects?
- i) Have you thought of newer ways to promote your mobile video & TV services or are still relying on conventional techniques?
- j) Have you thought of collaborating with other industries in tapping further mobile video & TV subscribers?

If you affirm to any of the above questions our research could be a ready reckoner for you.

As voice revenues are slowly being choked off by the spreading tentacles of data traffic, the most crucial question in front of MNOs worldwide is – How to keep spiraling up their ARPU's in front of this relentless assault? Granted, there's 4G LTE/ WiMAX as a soothsayer....however, we aren't talking of the un-of-the-mill data consumption – The global mobile data traffic would go over 10 exabytes a month by 2016 as per the research sleuths of TeleResearch Labs – and video content would comprise the lion's chunk of the matter. Why is this so?

Well, firstly, owing to the simple fact – What's visualised is better perceived/ understood, globally, be it an avid music lover or a porn addict (no pun intended), or, the big-shot C-Level executive of any business, be it Telecoms, IT, Retail, Manufacturing etc. With the varied differences in the socio-economic make-up of countries spanning from North America to the depths of Africa, and the fastly-rising lifestyles of people in Asia, to Australia & New Zealand, the time is Now for all MNOs & the producers of mobile communications devices to Act rather than feel hopelessly outdated within the next 4 years – And that's what led to the birth of our latest investigation, justifiably titled – Mobile Video Adaptation & Delivery, 2012 – 2016.

The lifeline of any telecom operator across the globe is its ARPU's – As outlined above, have you, as a network operator, fully comprehended whether (or not) the much hyped

'super-fast' 4G LTE networks, which many of you claim would be launched before we bid adieu to 2012, be actually capable to quench the skyrocketing mobile data (in particular, video) traffic? How many 'second-best' strategies have you put in place to safeguard the stupendous amounts you are currently investing, or planning to invest into your networks to meet this challenge?

Then again, what about the device makers? They can't be left out of the fray as tier-1 business partners of all MNOs. With the plethora of mobile devices – be it smartphones, tablets, notebooks, netbooks, laptops etc., flooding global telecoms markets, the ultimate questions device makers need to ask themselves is whether they have/ are paying the due respect to market/ consumer segmentation or not? Are you still angling up that 'cram-all-features-into-one' strategy? Wake up if you are! There won't be any 'super, one-all mobile device – Yes, not even the much touted iTV, which's purportedly being launched by the company that's sort of made it its 'distract and win' ploy by filing lawsuits against its competitors across the global telecom canvas – Apple Inc.

Coming back to mobile operators again, the biggies out there might be sitting smugly after plunging billions of dollars into 4G networks/ technologies, but what about those who aren't so big, the ones just starting out - Be it upon the hot sands of the Middle East or the vast darkness of Africa, or across the arid plains of central Asia? Can they do something different Now to reach out and grab the tremendous opportunity that mobile video & TV, as a data content service, beckons all connected to the telecoms industry? Moreover, who should/ should not be the pioneer towards investing billions into this particularly challenging segment of the mobile communications industry?

These are some of the questions we have attempted to answer in our Report.

Apart from mobile devices'/ consumer/ economic/ cultural/ regulatory segmentation & roadmaps towards mobile video adaptation and delivery, TeleResearch Labs' experts have deduced numerous forecasts on mobile video subscribers, technologies, hindrances, ARPUs, and investments, globally as well as regionally – to assist each and every MNO and mobile device maker to chart his course of action beginning this year till 2016. And yes, as is our usual practice, our analysts made sure they left out nothing related to this concept of 'mobility' – So, unlike many other of our esteemed fellow research firms out there, we not only took into consideration smartphones as a medium of video services to the public and corporates, but included every other possible medium that facilitates mobility of video services – tablets, laptops, notebooks, netbooks, and even USB devices, and provided forecasts pertaining to all sections across all these mobile devices.

Convergence – That's what lies behind successful mobile video services' adaptation and delivery. So we have even gone beyond these mobile devices and attempted to inculcate and examine industries other than telecoms, for instance, automobiles, with suggestions to truly, exhaustively extract revenues from all possible sources via mobile video/ Pay TV services across different regions globally. This assumes importance as people's concept of accessing video/ TV is moving from fixed to mobile devices – Entertainment and infotainment, be it the common man or corporates, is being demanded 'while on the go'.

The ultimate purpose of this research is to provide MNOs and the mobile device makers with guidelines as to when/ how/ whether/ whether not to/ till what extent, make what/ how much of investments, and where/ where not into networks and partnerships targeted towards making mobile video services/ devices completely feasible and worth the time and money invested – so that all may reap the golden harvest that mobile visualisation has in store – be it from the perspective of the general public or business houses, right up till 2016. Moreover, we have analysed the peculiar qualities of remote/ unserved areas and suggested appropriate strategies for tier 2/ greenfield mobile network operators to make the very challenges of such areas into their strengths. Around 1.4 billion people accounting for 20% of the world population have no access to electricity including 585 million based in sub-Saharan Africa and remaining mainly from Southeast Asia. People, despite no electricity, are able to access mobile mainly in rural areas of these regions. This "off grid on Internet" population serves as an unserved target for mobile operators to accomplish their goals. Globally there are 32 countries where mobile data has already broken the electricity barrier. In 2011 total number of mobile users in sub-Saharan Africa and Southeast Asia exceeds the total on-grid population. By the end of 2013, the number of mobile users in the Middle East will exceed the Middle Eastern on-grid population, and by 2015 the number of mobile phone users in South Asia (India and surrounding countries) will exceed the South Asian on-grid population. It is expected that this off grid on Internet population is expected to reach around 138 million by 2015. Towards this our Report attempts to remove the fear/ hesitation which many tier 2/ greenfield operators could be harbouring towards investments in mobile video services. Several insightful and detailed case studies and analysis of mobile video services' pricing/ business models have been included in the Report to give you an indepth scenario of these services and how to commence and successfully manage them.

In chapter 3 we have delved into the global mobile TV market and besides other matters, covered and analysed the imperitiveness of convergence of mobile devices,

ways to monetise mobile video & TV services via selecting the most appropriate business model for operators at any stage of implementation of these services. Detailed and regional forecasts on mobile TV services based on subscribers/ revenues/technologies/ business models have been included to fully cover this segment.

Chapter 4 is devoted to the global mobile video services market, and includes roadmaps, guidelines for operators, particularly greenfield and tier 2 operators, ways to optimise CAPEX and maximise RoIs. Data traffic management, consumption patterns, and regional forecasts on subscribers and revenues are also included. How to expand your mobile video services subscriber base by venturing into other industries has been analysed to fully fortify this section.

Chapter 5 talks about the mobile devices' market and inculcates shipments and related forecasts.

Chapter 6 covers the various stakeholders' role in mobile video and pay TV services and includes an exclusive section on strategic business partnerships.

Chapter 7 revolves around the competitive landscape and contains several insightful case studies.

Chapter 8 discusses each and every avenue within mobile video services market, while chapters 9 & 10 cover and analyse the market catalysts and hindrances in detail.

Chapter 11 contains TeleResearch Labs' findings and conclusions.

Spread over a daunting 6 months and extensive traveling, interviewing, data mining and analytical efforts by our analysts, the time is ripe for you to sit back and relish the latest product from the house of TeleResearch Labs – Mobile Video Adaptation & Delivery, 2012 – 2016 – So that you may avoid wrong planning/ strategies for the next 4 years towards mobility of the ultimate data service, mobile video, and pen affective plays for your business to ensure maximal ARPUs with minimal costs and investments.

## **Key Findings And Forecasts**

K1 Global mobile TV/ video subscribers will surpass 900 million by 2016.

K2 Global mobile data usage per subscriber per month would be more than

6177 MB in the next four years. Highest data usage will be seen in North America followed by Europe.

K3 Soaring global mobile data traffic will account for 60% of the consumer Internet traffic by 2015, out of which mobile video will account two third of the total share.

K4 Global mobile monthly data traffic will increase 18 fold and reach 10 Exabytes (EB) by 2016. Asia Pacific will continue to dominate the market.

K5 US mobile video advertising spending will grow significantly and reach US\$ 372 million by 2016, and global expenditure on mobile advertising will reach approximately US\$30 billion by 2016 – and to what extent video will comprise the share.

K6 Global mobile operator's data revenues will surge significantly and reach US\$ 493 billion by 2016, and how video will be a major driver for this growth.

K7 Global mobile TV market will experience strong growth and would reach US\$ 7 billion by 2016.

K8 Which mobile operators should invest in mobile video segment at this stage, and which ones should not do so, and why.

K9 The best techniques to converge mobile video services and devices, based on affective user/ market segmentation.

K10 At least 40% of smartphone users will use mobile video services from the current 29% by 2016.

K11 More than 40 countries including India, Indonesia, Nigeria, etc. will have a break through in mobile video market after mobile network will break the electricity barrier by 2016.

K12 Mobile video consumption is surging exponentially and will surpass 693 billion minutes by 2015.

K13 Global mobile consumer device shipments would reach 2.8 billion units in 2016.



K14 TV viewing on tablets would increase to approximately 3 hours each month by 2014.

## **Key Questions Answered**

Q1 How is the mobile video market defined and segmented?

Q2 What are the drivers and inhibitors that will affect the mobile video market in the future?

Q3 Who are the stakeholders in the market and what are their key roles in it?

Q4 What is the size of the devices' market that play vital role in the delivery of mobile video services?

Q5 What are the types of business models being adopted to make the services deliverable and profitable?

Q6 What are the standards and technologies used to deliver mobile video services?

Q7 How are regional markets regulated and their affect on mobile video services and investments?

Q8 What is the current status of the global and regional mobile video market and how it will be headed in the future?

Q9 What are the key assumptions and rationale behind mobile video services that will define the market 's future?

Q10 What are the key findings analysed by TeleResearch Labs & suggestions offered by it?

Q11 How could the mobile app and mobile content community take advantage of mobile video market?

Q12 What are the key developments and new offerings in the market?

Q13 To what extent does video really 'spam the network' and what are best ways to affectively offload/ manage data traffic?

Q14 How can traditional content owners capitalise on the mobile video services vis-à-vis smartphones and tablets as delivery mediums?

Q15 How greenfield operators can optimise their CAPEX for mobile video/ Pay TV services?

Q16 Which are the industries which could tap in mobile video services?

## **Who might Be interested in this Report?**

### **Telecom Investors**

With an obvious interest in the ongoing happenings within the mobile video segment of Telecoms, the report provides indepth-insight for telecom investors they cannot neglect. High concerns on the possible variance their investments might go through, is a good enough reason why this report will be beneficial for them.

### **Operators**

For a better understanding of the dynamics of mobile video markets across the globe, this study would also provide global opportunities and competitive analysis. Business Case Studies, Absolute picture of the mobile video subscriber growth & psychology and recent technological developments make this a must read for better understanding of current and upcoming scenarios.

### **Device Makers**

For better product development and giving a competitive edge to the product in sync with the technological revolution.

### **Vendors**

For better product development and giving a competitive edge to the product in sync with the technological revolution.



### **Service providers and Application Developers**

Insight on the market expectations and forecasting risks and opportunities as MBB would plunder along global markets in the years ahead.

### **Content providers**

The possible changes that content development might go through and issues of adaptability solved.

### **Regulators**

A study of regulatory standards maintained across the globe and the possible amendments that might be required.

### **Educational Institutes (esp. in the telecom or IT sector)**

A complete analysis with case studies for in depth understanding of the MBB technology revolution. A compelling study and research material for both students and professors.

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