

Mobile broadband and portable computers: revenue, user and traffic forecasts 2009-2017

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Introduction

- The vast majority of future mobile broadband traffic and revenues will be divided between handsets on the one hand, and laptop and netbook computers ('portables') connected via USB modems, datacards or embedded mobile modules on the other. In this report we present 37 pages of revenue, user and traffic forecasts via portables up to and including 2017, split by five key regions (Europe, Asia Pacific, North America, Latin America, and Middle East and Africa). These include separate forecasts for LTE (Long Term Evolution).
- Key Questions answered by this report:
 - How much service revenue and ARPU will users of mobile broadband via portables generate by region each year up to 2017?
 - What proportions of these revenues and ARPU will be derived from LTE?
 - What will the take up of mobile broadband across each region each year be, and how much and what types of traffic will they generate?
 - What proportions of revenue, users and traffic will be generated by LTE each year up to 2017?
 - Which will be the prime regions for 3G and LTE deployments?
 - What are the trends, drivers and constraints impacting and shaping the development of the mobile broadband, including LTE, market?

Selected highlights

Among the extensive projections are the following:

- 418m people will be using mobile broadband via netbooks and laptops ('portables') by 2017. Following significant growth during 2008, this is a three fold increase over 2009 and a CAGR of 17%
- By 2017, Asia Pacific and Europe will form 61% of all mobile broadband subscribers via portables
- Users in Asia Pacific will grow the most, at a CAGR of 21%. Although Europe will grow the least, it will still achieve a CAGR of 11%.
- Rise in users will not correspond with a same rise in revenues, which will rise by 140% over 2009. Asia Pacific will gain greatest revenues, at US\$15bn in 2017. Europe will be close behind, at US\$13bn in 2017. Together, Asia Pacific and Europe will account for 60% of revenues.
- Disproportionate growth in users over revenues means a significant decline in ARPU of one third. Reduction in ARPU will be most significant in Asia Pacific, and Middle East and Africa. ARPU will be greatest in North America, at US\$160.
- Data traffic via portables will grow 40 fold by 2017, to 1.8 exabytes per month (CAGR 59%)
- Video data traffic will grow the greatest (CAGR 68%), and will account for over half (53%) of traffic via portables by 2017.
- Traffic from Asia Pacific users will be the greatest among all the regions, consisting of just under half of all worldwide traffic per month (46%). 57% of monthly Asia Pacific traffic via portables will video
- After a ramp up in LTE production in 2012, worldwide users will rise to 209m in 2017
- Although Asia Pacific will have the most users across all regions, Europe will dominate in terms of the proportion of mobile broadband users employing LTE (75%). However, the emergence of future generation mobile broadband will begin to impact LTE growth in Europe from 2017
- ARPU from LTE users will decline at around the same rate as ARPU across all mobile broadband from 2010. However, ARPU from LTE will be consistently higher, and will be 17% higher than all mobile broadband ARPU in 2017.
- In contrast with all mobile broadband revenues, LTE revenues will greatest in Europe. LTE revenues in Europe will rise by a CAGR of 47% over 2012, and will form 83% of all mobile broadband revenue in that region.
- LTE will lead to more traffic per user than for mobile broadband in general. LTE via portables will hit 1.1 exabytes per month in 2017, with Asia Pacific taking up 45% of this