

The 2013 Insight Market Research Agenda

2013

MARKET
RESEARCH
AGENDA

Global Wireless Services: Trends, Technology, Forecasts, 2013-2018

www.insight.corp.com/reports/wireless13.asp

The global wireless market is the growth engine for telecom service providers, equipment manufacturers, and component suppliers. INSIGHT conducts primary and secondary research to measure this growth, while our expert analysts prescribe winning solutions for the next five years. This report addresses the entire wireless services market, providing detailed forecasts of the revenues in each region: North America; Europe, Middle East & Africa; Asia & Pacific Rim countries; and Latin America. *Global Wireless Services 2018* provides trend data by technology, business vs. residential usage, post-paid vs. pre-paid, and subscriber trends, including churn vs. ARPU. The study provides five year revenue forecasts and units for all types of wireless services, including voice, data, and messaging.

US Wireless Voice: Retention and Harvest, 2013-2018

www.insight-corp.com/reports/wirelessvoice13.asp

Voice calling has shifted from wireline to wireless services over the past decade. From low penetration rates in the 1990s, wireless subscriber penetration has exceeded the total US population, while wireline access lines continue to be disconnected at a ten percent annual rate. Given this market dynamic, it is critical for service providers to retain their customer base and cash flow generated by over 300 million mobile users. This study provides a comprehensive analysis of the US wireless voice services marketplace, including details by carrier, subscription plans, subscriber trends, pricing bundles, and minutes of use. The report provides five year forecasts of revenues, units, and pricing.

US Wireless Data: Changing the Way We Communicate, 2013-2018

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In every region, telecommunications traffic growth has shifted from wireline to wireless services—and what had been initially a voice-only medium has now taken off with such data-intensive services such as video-sharing, Internet searches, and transactional services. But what's on the horizon? Since 2002, the number of wireless subscribers doubled, monthly minutes quadrupled, and wireless data has grown 100-fold—but we are just seeing the tip of the iceberg. Mobile application expansion, increased numbers of mobile workers, and new wireless technologies available in smartphones, tablets, and machine-to-machine devices will extend this exponential traffic growth well into the next decade. This study peers into the future by providing a detailed assessment of changing traffic patterns, spectrum requirements, LTE and WiMAX deployments, and gauges the arrival of new usage patterns. And just like every INSIGHT study, this report will provide a comprehensive set of five year forecasts including revenues, units, and pricing by wireless service types.

The Global Wireline Voice Industry: Threats and Opportunities 2013-2018

www.insight-corp.com/reports/wirelinevoice13.asp

Wireline voice services for residential and businesses users have been the foundation for the telecom industry in every global region, yet fixed access lines and minutes of use have been steady decline over the past decade. In most developed countries, new home and commercial building construction—the most predictable factor in wireline services growth—has virtually stopped. For carriers this means retaining customers and remaining profitable will require a raft of innovations centered around service bundles and streamlining operations. Preserving wireline customers and migrating them to advanced data, conferencing, and video services is critical to service provider's survival, and this study looks at industry innovators globally. Revenue forecasts include units measures, ARPU, and details by key areas such as VoIP, conferencing, and call center volumes.

US Wireline Data 2013-2018: Advanced Strategic Services

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Wireline data services have replaced voice as the growth engine of the wireline business. Wireline-enabled services such as broadband Internet access, IP transaction services, Ethernet connectivity in all its variations, frame relay and private lines are the foundation for many entertainment and business services—and the continued growth coming from wireless data, cloud, and IPTV services will extend the life of these wireline data services well into the next decade. The study provides detailed analysis of residential and businesses wireline data services. Business services are further segmented by business size and wholesale vs. retail. This study includes detailed forecasts of data services revenues, circuits, packets, and pricing, along with projections of migration patterns from legacy data services to the advanced strategic mix of services required by B2B and B2C applications.

US Wireline Video: On-Demand and Over-the-Top, 2013-2018

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As video services are distributed on-demand online, the programming and distribution model invented by the cable and satellite industry 60 years ago becomes less and less relevant. Technologies such as VDSL2, MPEG4, and GPON have leveled the playing field—giving new powers to telecom service providers and diminishing the power of content aggregators. Differentiating video services in the future will require a balanced mix of content, advanced distribution models, and ancillary transaction services. The report covers the perspective of incumbent cable, telco, and satellite providers and asks what will be their business models in five years? Detailed forecasts of video services revenues, subscribers, bundles, and pricing, with projections of on-demand and over-the-top (OTT) usage are provided, and multiple scenarios covering the industry's evolution are explored.



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The 2013 Telecommunications Industry Review: An Anthology of Market Facts and Forecasts

www.insight-corp.com/reports/review13.asp

The 2013 Telecom Industry Review summarizes current conditions across the global telecommunications industry, providing analysis of multiple infrastructure and service segments. From fundamental background issues to detailed five-year forecasts accompanied by practical strategic advice, this study provides a comprehensive examination of the global telecom services and equipment marketplace. With Europe in economic turmoil, the path to sustained growth will be bumpy for the next few years. Despite such harsh economic times, telecommunications remains a crucial means of helping countries weather hard times by boosting growth and improving productivity. This report looks at the global telecommunications services and equipment market in each region: North America; Europe-Middle East-Africa; Asia and the Pacific Rim countries; and Latin America. The *Review* provides up-to-date information in such key areas as wireless demand, optical networking, VoIP, residential and business communications trends, IPTV and cloud services.

The Global Telecommunications Equipment Forecast, 2013-2018

www.insight-corp.com/reports/equipment13.asp

The health of the telecommunications equipment market is a leading indicator of the direction being taken by the telecom services market. Telecommunications infrastructure is a critical element to every economy, underpinning trade, industry, and finance, and personal communications. As the global economy recovers from recession, capex for telecom will occur in advance of this growth. Indeed, as the World Bank has estimated, a one percent growth in a country's GDP requires an infrastructural investment of one percent of GDP in water and sanitation, energy, transportation, and telecommunications. This report looks at the entire global telecommunications equipment market in each region: North America; Europe-Middle East-Africa; Asia and the Pacific Rim countries; and Latin America. This study provides forecasts of key equipment areas such as wireless handsets, radio access networks, optical transport components and CPE, as well as backbone routing and switching gear.

Global Telecommunications Capital Expenditures, 2013-2018

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Carriers and other services providers continue to invest heavily in new infrastructure as they deploy new architectures and increase capacity on existing networks and in data centers. Capex investment is critical to the ongoing health of their businesses. Infrastructure includes both wireless and wireline, while data centers and CPE represent an increasing percentage of all capex spending. This report looks at the global telecommunications capital expenditures in such key areas such as wireless RAN, optical transport, CPE, storage and data center networking, routing, and switching in each region: North America; Europe-Middle East-Africa; Asia and the Pacific Rim countries; and Latin America.

Global Telecommunications Enterprise Equipment Trends, 2013-2018

www.insight-corp.com/reports/eqptenterprise13.asp

The enterprise equipment market has gone through several transformations and cycles over the past two decades, as businesses expand their application capabilities while contracting their in-building equipment purchases. Mobility has introduced another variable, allowing business application users to move within the office and outside of the building while increasing overall applications usage. Smartphones, tablets and other wireless devices will dictate the next phase of enterprise equipment designs, while optical access will ultimately handle most of the fixed traffic. This report looks at the enterprise equipment market in North America; Europe-Middle East-Africa; Asia and the Pacific Rim countries; and Latin America and discusses the technology and usage trends that will drive the next cycle. Forecasts are provided for a range of equipment categories, including wireless LANs, access, storage, routing, switching, and end-user devices.

Global Consumer Telecommunications Equipment Trends, 2013-2018

www.insight-corp.com/reports/eqptconsumer13.asp

Continually rising smartphone and tablet sales accompanied by a slowdown in PC sales is proof that the consumer equipment markets have gone mobile. Mobility allows the business application user to move within and outside of the office—and now residential applications for consumers around the globe are reaching a comparable level of complexity and sophistication. Smartphones, tablets and other wireless devices will govern the future of consumer equipment purchases. This report looks at the global telecommunications consumer equipment trends in North America; Europe-Middle East-Africa; Asia and the Pacific Rim countries; and Latin America, and discusses the technology, subscriptions, usage trends, and spending over the next five years. Forecasts are provided for tablets, smartphones, featurephones, monitors, and IPTV devices.

The Future of Telecommunications, 2013-2018

www.insight-corp.com/reports/futuretel13.asp

These are facts: the PSTN is moribund and IP networks have taken over; on a global basis mobile communications is the preferred mode of connecting people and information; traditional telecom equipment vendors can only survive by selling software and services that use commercial computing platforms; and regulatory oversight is being replaced by market competition. Networks must now be designed and operated from the bottom up rather than from the top down so that centralized control defers to peripheral control. Convergence means that companies which used to be in separate industries—telcos, mobile operators, ISPs, cable and entertainment firms—are now in the same business. The report will examine what the industry makeover will mean for telcos, mobile operators, ISPs, systems integrators and OEMs, and what they need to do to remain competitive. We analyze the impact of the technology shift on economic growth prospects in developing and developed countries, and the opportunities and risks it represents for service providers and equipment vendors, as well as governments.

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US Carriers & Ethernet Services, 2013-2018

www.insight-corp.com/reports/ethernet13.asp

Carrier Ethernet is a \$5 billion annual US market allowing enterprises to virtual LAN locations across metro, regional, & global areas. These accessible services offer significant advantages in cost and simplicity compared to traditional private line & frame relay, and Public Ethernet is among the market's fastest growing segments as enterprises large & small opt for offerings. Market size, growth, and revenue are projected with segmented breakdowns of point-to-point and any-to-any services and by interface levels ranging from 10 Mbit/s to 100-Gbit/s.

Cable TV Operators, Telecom Services, and the Push into the Enterprise, 2013-2018

www.insight-corp.com/reports/enterprise13.asp

Parsing the entire telecom market, business services is second only to wireless in revenue. US cable operators generate over \$7 billion in annual business service revenues. Operator market share is growing, but real success lies in enterprise & medium-sized business penetration. This study details MSO & telco business services, including revenue & unit forecasts for voice, data, & video services to small, medium & large enterprise segments. It details a range of services, including Ethernet, private line, voice, hosting, optical transport, & video; and examines CATV operators' use of existing fiber networks to support telecom services.

Private Line and Wavelength Services, 2013-2018

www.insight-corp.com/reports/pl13.asp

The private line (PL) market remains strong despite a shift to packet-based Ethernet and IP/MPLS services. This study explores new optical and copper technologies that have extended PL's life. Demand for more bandwidth and increasing backhaul requirements—particularly for 4G wireless backhaul circuits—had been the drivers of these services, but demand is slowing. This report provides detailed revenue & circuit counts by carrier type and defines the split between wholesale & retail sales of T-carrier & OC-N circuits, gigabit Ethernet, and wavelength services.

Managed Services in an IP World: Global Opportunities for Wireless and Wired Networks, 2013-2018

www.insight-corp.com/reports/manserv13.asp

Managed services continues to expand as enterprise customers turn to service providers for end-to-end network solutions. Outsourcing network design, equipment, and 24x7 management, IT managers have more options—and as applications move to the cloud and endpoints shift to wireless access, managed services become more attractive. This study expands our US series to include a global perspective & forecast, differentiating among five managed marketplace segments: WAN, LAN, mobility, data center, and infrastructure. Forecasts for market subdivisions, including managed IP VPNs & IP endpoints, security services, WLANs, VoIP services, and hosting & storage are provided.

Telecom Services in Vertical Markets, 2013-2018

www.insight-corp.com/reports/vertical13.asp

The sixteenth study in our Vertical Markets series quantifies spending habits of major US industry segments for wired & wireless services, and examines spending trends in the general economy. The study delves into wired and wireless voice & data spending patterns for segments including: healthcare; construction; retail trade; wholesale trade; education; financial, insurance, & real estate; professional business; hotel and lodging; transportation; communications; utilities; entertainment and media; durable manufacturing; & non-durable manufacturing.

US Consumer Services Trends, 2013-2018

www.insight-corp.com/reports/svcsconsumer13.asp

The residential services market remains a large and dynamic segment within the US telecom industry. What was once a wireline, voice-only medium is now transactional wireless data providing banking services to point-of-sale and on-demand video. With wireless and broadband penetration reaching saturation, servicing consumers requires new approaches to marketing & customer support. This report provides a comprehensive analysis of wireless & wireline consumer services and offers detailed assessment of changing traffic, usage, and communications patterns amongst consumers with comprehensive five year forecasts of revenues, units, and pricing.

US Telecom Buying: Changing Consumer & Business Purchase Patterns, 2013-2018

www.insight-corp.com/reports/buying13.asp

Telecom markets have traditionally been segmented along consumer & business boundaries—residential buyers needed in-home voice, data, & video services, while businesses or enterprises required multi-station voice and private data services. Over the past few years the Internet and a new generation of hand-held wireless access devices have killed the old model, blurring the boundaries between business-to-consumer (B2C), business-to-business (B2B), and consumer-to-consumer (C2C) domains. This report looks at changing buying patterns in the US and presents hypothetical scenarios for how changing buying behaviors will reshape telecom purchasing decisions. This study also provides assessments of changing industry revenue models.

US Broadband Penetration and Impacts on User Applications, 2013-2018

www.insight-corp.com/reports/broadband13.asp

Broadband services have grown beyond all early forecasts, approaching 90 million homes in the US and 600 million globally as consumers and businesses recognize the utility of the Internet. In 10 years penetration has doubled, traffic has grown ten-fold, and speeds have increased to handle bandwidth-intense applications. With near-ubiquitous availability of broadband services, a new class of user applications—from healthcare to home monitoring to video on-demand—will raise the value. This report looks at US consumer and business broadband applications and assesses their impact on revenues, usage, and pricing across the broadband market.

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- Pricing Analysis and Competitive Assessment of Converged Service Offer (*Tier 1 Carrier*)
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Recent Insight Reports

Telecom and the Financial Services Industry: Optical Networking, Wireless Networking, and the Role of Redundancy and Recovery in Financial Transactions, 2012-2017

www.insight-corp.com/reports/financial12.asp

The sanctity of transactional data is critical in the banking and financial industry. Banks, Wall Street investment firms, insurance companies, and other financial institutions have led the way in securing their networks by establishing sound business continuity practices, making huge investments to ensure safe data transport and management. The robustness of telecom topology is critical in determining the effectiveness of the financial industry's business continuity practices. This report examines the role played by telecommunications in facilitating data storage, security and integrity in the financial domain. This study will cover market sizes for relevant metrics such as disaster recovery applications, hosting services, security management, backup and storage management, load balancing, storage area networks as well as wireless and wire-line traffic and revenues associated with data recovery through resource redundancy in the finance domain.

Telecommunications and Capital Investments 2012-2017: Looking Beyond the Financial Crisis

www.insight-corp.com/reports/invest12.asp

This report examines the impact of the financial meltdown and Euro zone sovereign debt crisis on telecommunications industry investments. Furthermore, the report looks at potential opportunities for operators and OEMs during this period of exceptional market turmoil: what are the inherent risks and which operators are best equipped to weather the crisis: mobile or fixed? Forecasts of operator capex are provided for four classes of spend: infrastructure equipment, plant, CPE, and wireless spectrum licenses. The analysis focuses on operators in North America, key EU member states, select Asian countries, Latin America, and Africa.

Telecom, IT and Healthcare: Wireless Networks, Digital Healthcare and the Transformation of US Healthcare, 2012-2017

www.insight-corp.com/reports/telehealth12.asp

The \$3 trillion US ecosystem of hospitals, physicians, pharmaceutical companies, and insurance providers that make up the healthcare industry will be spending over \$100 billion between now and 2017 on telecommunications services and equipment. New healthcare delivery systems are needed to handle the repository and access to healthcare information that will advance future treatments. Fiber optics, wireless access, and digital transmission will transform healthcare networks while extending care to remote patients via telemedicine applications. This study examines the transformation of global healthcare information technology. The study identifies key demographic and technology drivers that will shape this transformation. Finally, we provide five-year revenue and unit forecasts for hardware and network services, by healthcare segment, by technology.