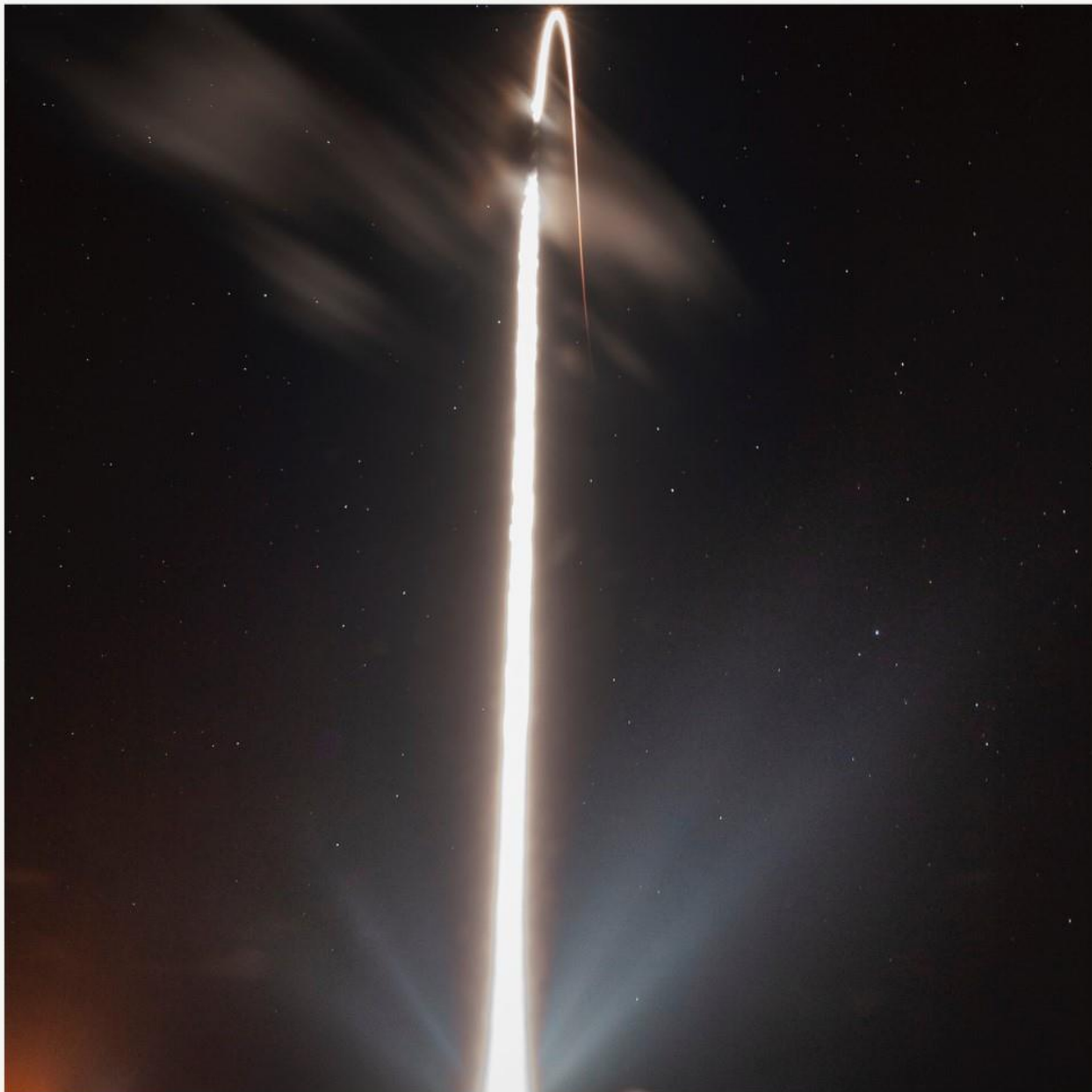


Satellite Broadband 2024



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Abstract: This report provides market trends of the satellite communications industry with a specific focus on the satellite broadband access market. The report covers satellite technology trends, including a growing number of GEO, MEO, and LEO constellations and their impact on the broadband access and mobile communications market. The report covers comparative economics of satellite broadband vs. terrestrial fixed wireless. Also provided is a five-year forecast of terminal shipment, pricing, service revenue, connections, and market share.

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METHODOLOGY

Mobile Experts studied public financial reports of key satellite operators, including Viasat, EchoStar (HughesNet), Eutelsat, SES, Telesat, Iridium, Inmarsat, Intelsat, and others, to determine the satellite communications revenue breakdown and respective companies satellite constellation plans. Also, we reviewed public statements, including earnings calls, social media posts, and conference presentations from key executives in the industry, including spacecraft manufacturers, operators, and mobile industry to identify key technology trends related to 5G and space/satellite industry. To validate the details,, we surveyed sources in the satellite and mobile industries to inform our view.

In addition, we relied on our *Fixed Wireless Access (FWA)* and *5G Business Case* market research series to inform our view of unit economics of terrestrial 5G FWA to contrast against unit costs of LEO and GEO satellite broadband for comparative unit economic analysis.

Furthermore, we relied on our *Private Cellular Network* research and *Cellular IoT* market research for pricing trends and satellite broadband impact on those market segments.