



Mobile Messaging Futures

2007-2012



KEY FEATURES OF THIS NEW MARKET REPORT:

- Detailed regional SMS growth forecasts to 2012
- Understand the present dominant position of SMS as the worlds leading messaging technology
- SMS revenues by region now and forecast to 2012
- Understand the state of messaging markets now; key country markets; leading operators; major vendors
- Detailed MMS traffic and revenue forecasts, by region, to 2012
- Study MMS growth and likely future prospects
- Examine future developments and the rapid growth of mobile email and mobile IM
- Analyze where SMS is making substantial money for the mobile industry NOW
- Complete breakdown and analysis of this worldwide \$80 Bn USD industry

VALUABLE
NEW
MARKET STUDY

Mobile Messaging Futures 2007-2012

Mobile messaging is an integral and vital part of the mobile industry and contributes significantly to worldwide total mobile service revenues. This extensive new Portio Research report offers a complete study of worldwide mobile messaging markets, forecasting SMS and MMS traffic volumes and revenues for the period 2007-2012, and forecasting mobile email and IM user growth for the same period. It provides a detailed analysis and a regional market summary of the mobile markets of Europe, Asia Pacific, North America, Latin America, Africa and Middle East, specifying messaging revenues and volumes in each market and identifying key countries in each region. The report studies the major categories of mobile messaging, i.e., short messaging service (SMS), multimedia messaging service (MMS), mobile e-mail and mobile instant messaging (IM).

Key features of the report include the following:

- Summary of the worldwide mobile market; comparative summary of the markets in each major geographic region
- Evolution of mobile messaging
- Current and future prospects of the SMS industry, including forecast traffic volumes and service revenues
- Analysis of the MMS market's strong future prospects
- In-depth analysis of the rapidly growing mobile e-mail and mobile IM services
- Regional market summary and forecasts of SMS and MMS growth, in terms of traffic volumes and revenues.

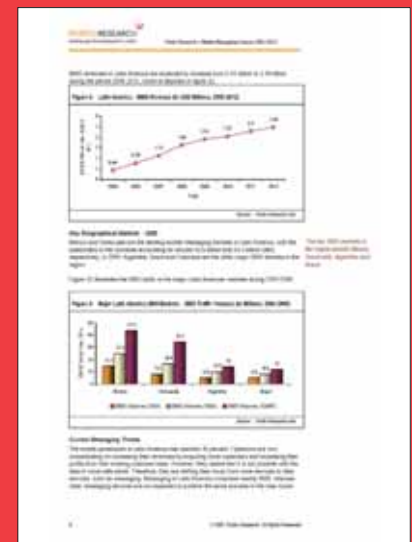
The worldwide population is expected to rise from approximately 6.55 billion to approximately 7 billion between 2006 and 2012, and at the same time we forecast the worldwide mobile subscriber base to also increase from 2.65 billion to 4.81 billion. Asian markets, which are growing at a staggering pace, are expected to account for 50 percent of the total worldwide subscriber base by 2008. Also, the rise in mobile penetration in Latin America and Africa will contribute significantly towards the overall growth of the mobile market.

Although revenues from voice calls still comprise 80 percent of worldwide total mobile revenues, operators globally are focussing on data services for increasing their average revenue per user (ARPU). Of the various data services available, while attracting none of the glamour as a leading product in most MNOs service portfolio's, SMS actually accounts for approximately 75 to 80 percent of non-voice service revenues worldwide.

After a slow start, MMS has also started experiencing significant growth in several regions, especially in North America. Since interoperability agreements were finally put into place in 2005, the North American market has enjoyed rapid growth in MMS traffic. While North America and Europe now enjoy growing MMS traffic and revenues, MMS is still quite weak in much of Asia and other regions, namely Latin America and most of Africa and the Middle East.

Apart from SMS and MMS, mobile e-mail and mobile IM are showing strong future growth prospects in some geographic regions. Apart from North America and Europe, mobile e-mail is expected to grow significantly in the mobile markets of the Asia Pacific region. The success of mobile e-mail is largely driven by the growth of more advanced handheld devices, such as PDAs and smartphones, so obviously growth of these services will be broadly restricted to the wealthier, more advanced markets for the immediate future.

This study takes an in-depth look at worldwide mobile messaging markets, with an aim to offer you the facts and figures to enable operators, content developers, aggregators and handset vendors to identify the key mobile messaging services of the future and the key markets where those services will flourish.



You can read all about this and much more in this in-depth new 142-page market study

Mobile Messaging Futures 2007-2012

Table of contents

CONTENTS

INTRODUCTION

INTRODUCTION TO MOBILE MESSAGING

- Evolution of Mobile Technology
- Evolution of Mobile Services
 - Short Message Service (SMS)
 - Multimedia Message Service (MMS)
 - Mobile E-mail
 - Mobile Instant Messaging (MIM)

WORLDWIDE MOBILE MESSAGING MARKET

- Worldwide Mobile Market Growth
 - Subscriber Growth and Penetration
 - Regional Comparative Summary
- Mobile Messaging Services – Worldwide
 - SMS
 - MMS
 - Mobile E-mail (Demand Side)
 - Mobile E-mail (Supply Side)
 - Mobile IM
 - Video Messaging
 - Video Mail
 - Unified Messaging
- Messaging Solution Vendors
 - Key Vendors – Enterprise Mobile E-mail
 - Key Vendors – Consumer Mobile E-mail
 - Key Vendors – Video Mail and Unified Messaging
- Mobile Messaging Services – Regional Outlook
 - North America
 - Latin America
 - Africa and Middle East
 - Asia Pacific
 - Europe

CONCLUSIONS AND RECOMMENDATIONS

APPENDICES

- Glossary
- Portio Research Classifications
- Companies mentioned in this report
- About the Authors

List of Figures

- Fig 1: Evolution of Mobile Network Technology
- Fig 2: Growth of Data Services with Evolution of Mobile Technology
- Fig 3: Traditional SMS Delivery Model
- Fig 4: SMSC Delivery Model Based on Intelligent Network Approach

- Fig 5: MMS Delivery Model
- Fig 6: Worldwide Mobile Subscribers and Penetration (2002-2012)
- Fig 7: Worldwide SMS Traffic Volumes (In Billions, 2005-2012)
- Fig 8: Worldwide Growth of P2P Messaging (In Billions, 2005-2012)
- Fig 9: Worldwide Growth of A2P Messaging (In Billions, 2005-2012)
- Fig 10: Worldwide SMS Revenue (In USD Billions, 2005-2012)
- Fig 11: Worldwide A2P and P2P SMS Revenue (In USD Billions, 2005-2012)
- Fig 12: Worldwide MMS Traffic Volumes (In Billions, 2005-2012)
- Fig 13: Worldwide MMS Revenue (In USD Billions, 2005-2012)
- Fig 14: Worldwide Mobile E-mail Subscribers (In Millions, 2005-2012)
- Fig 15: Enterprise Mobile E-mail Solutions Market Share (H1 2006)
- Fig 16: Worldwide Mobile IM Subscribers (In Millions, 2005-2012)
- Fig 17: Video Mail Solution
- Fig 18: Video Mail Solution Vendors Sales Channel
- Fig 19: Relationship Between UM Server and Components of Communication Systems
- Fig 20: RIM: Annual Revenues and Blackberry Subscribers (2001-2006)
- Fig 21: Revenue Earned by Telecom Products – Worldwide (2005)
- Fig 22: Revenue – Openwave (2004-2006)
- Fig 23: North America – SMS Traffic Volumes (In Billions, 2005-2012)
- Fig 24: North America – SMS Revenue (In USD Billions, 2005-2012)
- Fig 25: North America – SMS Traffic Volumes (In Billions, 2005-2012)
- Fig 26: North America – SMS Revenue (In USD Billions, 2005-2012)
- Fig 27: North America – MMS Traffic Volumes (In Billions, 2005-2012)
- Fig 28: North America – MMS Revenue (In USD Billions, 2005-2012)
- Fig 29: Latin America – SMS Traffic Volumes (In Billions, 2005-2012)
- Fig 30: Latin America – SMS Revenue (In USD Billions, 2005-2012)
- Fig 31: Latin America – MMS Traffic Volumes (In Billions, 2005-2012)
- Fig 32: Latin America – MMS Revenue (In USD Billions, 2005-2012)
- Fig 33: Major Latin America SMS Markets – SMS Traffic Volumes (In Billions, 2004-2006)
- Fig 34: Africa and Middle East – SMS Traffic Volumes (In Billions, 2005-2012)
- Fig 35: Africa and Middle East – SMS Revenues (In USD Billions, 2005-2012)
- Fig 36: Africa and Middle East – MMS Traffic Volumes (In Millions, 2005-2012)
- Fig 37: Africa and Middle East – MMS Revenues (In USD Billions, 2005-2012)
- Fig 38: Key Africa/Middle East SMS Markets – SMS Traffic Volumes (In

- Billions, 2004-2006)
- Fig 39: Asia Pacific – SMS Traffic Volumes (In Billions, 2005-2012)
- Fig 40: Asia Pacific – SMS Revenue (In USD Billions, 2005-2012)
- Fig 41: Asia Pacific – MMS Traffic Volumes (In Billions, 2005-2012)
- Fig 42: Asia Pacific – MMS Revenue (In USD Billions, 2005-2012)
- Fig 43: Key Asia Pacific SMS Markets – SMS Traffic Volumes (In Billions, 2004-2006)
- Fig 44: Europe – SMS Traffic Volumes (In Billions, 2005-2012)
- Fig 45: Europe – SMS Revenue (In USD Billions, 2005-2012)
- Fig 46: Europe – A2P and P2P SMS Traffic Volumes (In Billions, 2005-2012)
- Fig 47: Europe – A2P and P2P SMS Revenue (In USD Billions, 2005-2012)
- Fig 48: Europe – MMS Traffic Volumes (In Billions, 2005-2012)
- Fig 49: Europe – MMS Revenue (In USD Billions, 2005-2012)
- Fig 50: Key European SMS Markets – SMS Traffic Volumes (In Billions, 2004-2006)

List of Tables

- Table 1: Forecast Worldwide Mobile Subscriber Growth, 2002-2012 (In Millions)
- Table 2: Total Regional SMS Traffic (In Billions, 2005-2012)
- Table 3: Total Regional SMS Revenue (In USD Billions, 2005-2012)
- Table 4: Total Regional MMS Traffic (In Billions, 2005-2012)
- Table 5: Total Regional MMS Revenue (In USD Billions, 2005-2012)
- Table 6: Different Type of Mobile E-mail Solutions
- Table 7: Worldwide Smart Device (Smartphone and PDA) Shipments (2006-2012)
- Table 8: Forecast Worldwide Mobile E-mail Subscriber (In Millions, 2005-2012)
- Table 9: Handset Vendors and Operating System Providers
- Table 10: Forecast Worldwide Mobile IM Subscriber (In Millions, 2005-2012)
- Table 11: Worldwide Video Messaging Subscribers and Revenue (2004-2009)
- Table 12: Segments of Unified Communications
- Table 13: Revenue Segmentation by Products (FY 2005)
- Table 14: MMS Users as a Percentage of Total Number of Subscribers (2003-2005)
- Table 15: SMS Intensity – SMS-per-subscriber-per-month (2005-2012)
- Table 16: SMS Intensity – SMS-per-subscriber-per-month (2006) for Key SMS Markets
- Table 17: SMS Intensity for the top 15 SMS-carrying MNOs (2005)
- Table 18: SMS Intensity for the top 15 SMS-carrying MNOs (4Q 2005)

Whilst every care is taken to ensure the details contained herein are accurate and true to the best of our knowledge, the Table of Contents and prices in this brochure are subject to change without notice, at the publishers discretion. All rights reserved. Portio Research Ltd.

PRIORITY ORDER FORM FOR

Mobile Messaging Futures 2007-2012

Name _____

Company _____

Position _____

Postal address _____

City _____ Region/State _____

ZIP/Postal code _____ Country _____

Phone _____ Fax _____

Email _____

Please accept my order for 'Mobile Messaging Futures 2007-2012' (please tick)

1-5 user team licence:

£1495 GBP / \$2995 USD / €2295 Euro

Small or medium size company licence:

£1995 GBP / \$3995 USD / €2995 Euro

Large corporate unlimited licence:

£2995 GBP / \$5990 USD / €4495 Euro

NB: UK prices do not include VAT, please add VAT at 17.5%

Please accept my payment by credit card:

Card Type: VISA / MASTERCARD / AMEX

Card No _____

Expiry Date: Month _____ Year _____

Name on card _____

Signature _____

Please invoice me:

Billing address if different from above: _____

Your purchase order number _____

I wish to make a bank transfer, please send me bank account details

Details you provide on this order form will be held by Portio Research Ltd and may occasionally be used for marketing purposes, but only in relation to goods or services that we believe may be of interest to you. No details will be disclosed to third parties and we do not rent or swap our databases with external marketing companies. If you do not want your details to be retained on our database, please indicate here by ticking this box. []

HOW TO ORDER THIS NEW REPORT NOW...

To place your order for this new study, please contact us in one of the following ways:

Email us at

sales@portioresearch.com

Call us on

+44 (0)1249 656964

Fax your purchase order to us

on **+44 (0)1249 656967**

Fax the order form on

+44 (0)1249 656967

Portio Research Limited

Portio Research Ltd is an independent UK-based research company, focused on providing high quality, data-centric reports and database products.

Our Customers

Some of the leading companies who have previously purchased our reports or services include: **Alcatel : Amoi Electronics : Belgacom Mobile : Bell Canada : Boost Mobile : BT : Bulletin Wireless : Cotel International BV : Cisco : Comverse : Critical Path : DoCoMo Labs USA : Dolby Laboratories : End2End Mobile : Ericsson : Gemplus : InfoSpace : iTouch Plc : ITU : Kyocera Wireless : LogicaCMG : Microsoft : mm02 : Mobinil Egypt : Motorola : MTC Vodafone Bahrain : MTN Nigeria : NEC : Nokia : Novatel Wireless : Openwave Systems Inc : Playboy TV : Pannon GSM : Samsung : Saudi Telecom Company : SavaJe Technologies : Sendo : Sierra Wireless : SingTel : Sony Corp : SurfKitchen : Swisscom Mobile : Telcordia Technologies : Teleca : Teleglobe : TruePosition : U.S.Cellular : Ubiquity Software : Vimpelcom : VIPnet Croatia : Vodacom South Africa : Vodafone Group : Zi Corporation**