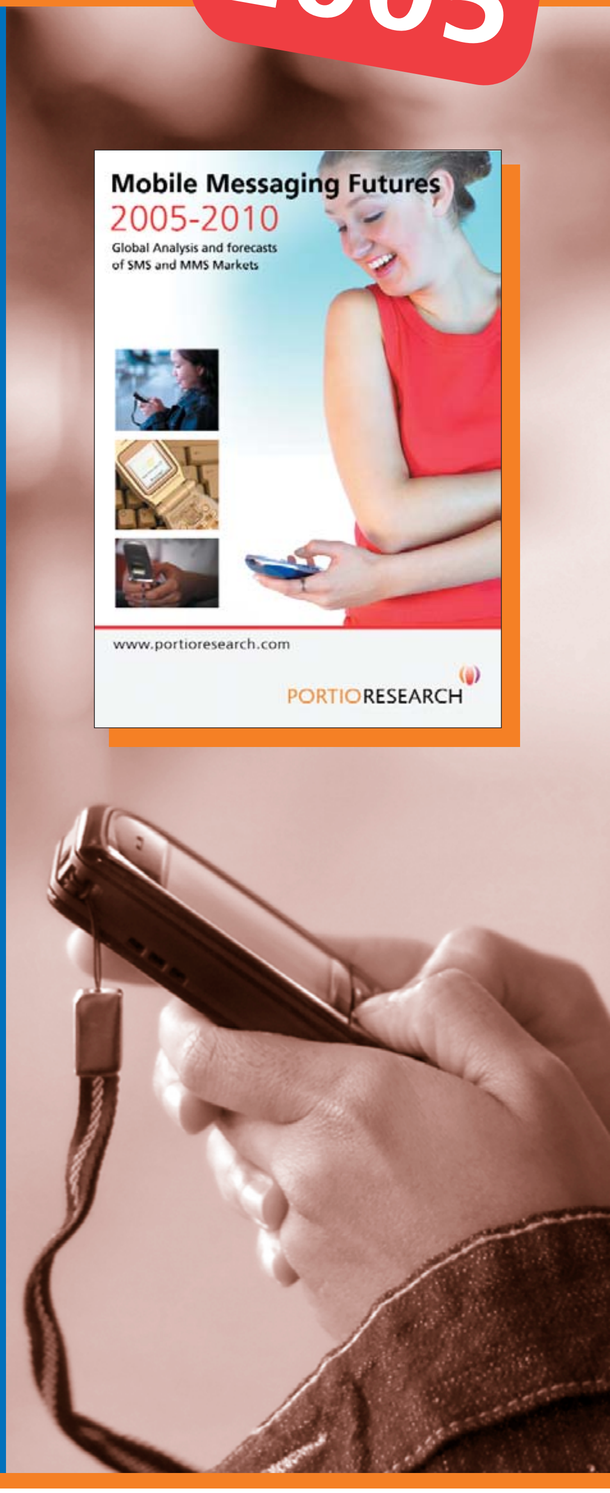
Mobile Messaging Futures 2005-2010

Worldwide analysis of mobile messaging markets, including detailed market sizing data, forecasts and country case studies.

NEW! July 2005

Key features of this new market study:

- Worldwide market sizing of mobile messaging industry, volumes and revenues by region and by messaging technology
- Understand the current state of SMS as the world #1 non-voice revenue generator
- Explore why MMS has failed to meet industry expectations and how will MMS grow over the next 5 years
- Analyze the future of mobile Instant Messaging and how it might replace SMS in some regions
- Country case studies explore regional messaging markets in detail
- Understand how migration to IP-based 3G networks will affect the messaging industry
- Analyze future opportunities in mobile email
- Detailed regional growth forecasts for SMS and MMS by volumes and revenues
- Recommended actions for driving messaging growth forward



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Since the first commercial SMS services started gaining ground in the late 1990's, the texting phenomenon has grown to epic proportions and it looks certain that we will see global SMS volumes exceeding 1000 billion messages in 2005. In the space of just a few years, mobile messaging has become an immense global industry generating over $55 Billion USD in 2005, the largest portion of this revenue comes from simple SMS, worth an estimated $35 Billion USD in 2005. The growth of MMS messaging has been sluggish since its launch in 2002. Network interoperability, format standardization, steep handset prices and inefficiencies in handset technology have plagued growth in MMS usage volumes. The uptake of MMS has been higher in advanced markets, such as Western Europe and Korea, but has continued to disappoint mobile operators, and now mobile IM and mobile email are looking for their place in global messaging markets too.

This new market study takes an in-depth independent look at global mobile messaging markets and delivers an accurate picture of the state of mobile messaging today. Reading this report you will gain a thorough understanding of why SMS has been such a global success, why MMS has failed to deliver on its promises and where newer messaging technologies fit into the bigger picture.

Key questions addressed in this study:

- Why has SMS been such a massive success?
- Is SMS set to be replaced, or is there a bright future in simple text messaging?
- Why has MMS failed to 'replace' SMS, as many originally said it would?
- Have the technical issues finally been resolved and is MMS now set to take off rapidly?
- Are mobile operators doing all they can to drive increased messaging use, boosting the all-important ARPU and 'data as a % of revenue' metrics?
- Which regional markets offer the brightest future opportunities for different messaging platforms?
- How will IP-based 3G networks change the messaging landscape?
- How fast will mobile instant messaging grow and where will you see that growth?
- Is mobile email just a niche enterprise application or does it have a wider appeal in consumer markets?
- Which messaging platforms generate the highest revenues for mobile operators?

Worldwide, 90% of non-voice operator service revenues (except in Japan and Korea) come from SMS. Voice still represents 80%-90% of all mobile traffic worldwide, and off the remaining 10%-20% that is non-voice, SMS represents approximately 90% of non-voice revenue worldwide, perhaps 80% in developed markets like Western Europe. As a result, revenue from SMS makes an extremely significant contribution to the all-important 'data as a % of revenue' metric which so many operators are working hard to improve. Mobile operators cannot afford to let SMS revenues fall, yet all the attention seems to be on MMS, 3G, PTT, HSDPA and other new technologies, while SMS does not receive the glory it deserves. This report explores these issues in detail and makes recommendations for increasing future messaging revenues.

Though the global technology sector had a tough time at the turn of the century, the mobile industry has continued to grow and total mobile subscribers worldwide passed 1.5 billion in 2004. This growth is forecast to continue for several years, reaching 2 billion by end 2005, and over 3.5 billion by 2010. On a regional level, the high-growth Asian markets are estimated to account for half of the total subscriber base, with China and India leading the way. Latin America and Africa will also contribute significantly to overall growth, while mobile subscriber growth in more advanced markets slows to saturation.

Worldwide, after numerous delays, 3G has finally come of age and the resultant fast new networks offer ample scope for newer services and lower operating costs. The number of 3G subscribers is gradually growing, though the new technology still has a long way to go before it achieves mass market penetration in developed markets. Despite the industry talk about advanced new data services and the realization of the 'wireless Internet', only one non-voice service can truly be described as a mass market success: SMS.

You can read about all this and much more in this new in-depth 150-page market study…

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