

Mobile Messaging & IP Evolution

Players, Strategies & Forecasts 2009-2014



List of Forecasts

All forecasts are for 2009-2014, except where noted below.

Regional forecasts cover 8 regions: North America, South America, Western Europe, Eastern Europe, Far East & China, Indian Sub Continent, Rest of Asia Pacific, Africa & Middle East.

Mobile Messaging

Total Global Revenues for Mobile Messaging (\$m), Split by 8 Key Regions

Total Global Revenues for Mobile Messaging (\$m), Split by Product (SMS, MMS, IM, Email)

SMS

Number of Mobile Subscribers Using SMS (m), Split by 8 Key Regions

Total Annual SMS Volume (m), Split by 8 Key Regions

Total Volume of Paid-for SMS Messages (m), Split by 8 Key Regions

Total Operator Billed SMS Revenues (\$m), Split by 8 Key Regions

SMS Based Advertising Revenues (\$m), Split by 8 Key Regions

Retail Cost per SMS (by Region) 2008-2013

MMS

Number of Mobile Subscribers Using MMS (m), Split by 8 Key Regions

Total Volume of Paid-for MMS (bn), Split by 8 Key Regions

Total Operator-Billed MMS Revenues (\$m), Split by 8 Key Regions

Total Ad-funded MMS Traffic (m), Split by 8 Key Regions

MMS Based Advertising Revenues (\$m), Split by 8 Key Regions

Email

Number of Mobile Subscribers Using Email (m), Split by 8 Key Regions

Total Operator-Billed Email Revenues (\$m), Split by 8 Key Regions

Number of Mobile IM Users (m), Split by 8 Key Regions

Cost Per Email Monthly Subscription (\$)

Instant Messaging

Number of Users Paying for Mobile IM (m), Split by 8 Key Regions

Total Operator-Billed IM Revenues (\$m), Split by 8 Key Regions

Total Number of Ad-funded Mobile IM Subscribers (m), Split by 8 Key Regions

Total Value of Mobile IM Ad-Spend (\$m), Split by 8 Key Regions

Cost per Monthly IM Subscription

Historical Data Points

KPIs by Region

All KPIs are for Q4 2007 to Q4 2008 unless stated below.

North America

AT&T KPIs (Revenues, Subscriptions & ARPU)
 Rogers Wireless KPIs (Revenues, Subscriptions & ARPU)
 Virgin Mobile USA KPIs (Revenues, Subscriptions & ARPU)

South America

America Movil KPIs (Revenues & Subscriptions)
 Telcel KPIs (Revenues, Subscriptions & ARPU)
 Claro (Argentina, Paraguay & Uruguay) KPIs (Revenues, Subscriptions & ARPU)
 Entel PCS KPIs (Revenues, Subscriptions & ARPU)
 Telefónica LatinoAmérica KPIs (Revenues & Subscriptions)
 Telefonica Moviles Chile KPIs (Revenues & Subscriptions)
 Vivo KPIs (Revenues, Subscriptions, ARPU & Market Share)

Western Europe

Vodafone Group KPIs (Revenues & Subscriptions) for Six Months Ended September 30, 2008
 Vodafone Group (Europe) KPIs (Revenues & Subscriptions) for Six Months Ended September 30, 2008
 Vodafone Group (Rest of World) KPIs (Revenues & Subscriptions) for Six Months Ended September 30, 2008
 Telefónica O2 Germany KPIs (Revenues, Subscriptions & ARPU)
 Telefónica O2 Ireland KPIs (Revenues, Subscriptions & ARPU)
 Telefónica O2 Czech Republic KPIs (Revenues, Subscriptions & ARPU)

Eastern Europe

mobikom austria group KPIs (Revenues, Operating Income & Subscriptions) Q4 2008 and Q4 2007 y-o-y Comparison
 mobikom austria KPIs (Revenues, Subscriptions & ARPU) Q4 2008 and Q4 2007 y-o-y Comparison
 Telefónica Móviles España KPIs (Revenues & Subscriptions)
 Telefónica UK KPIs (Revenues, Subscriptions & ARPU) Q4 2007 to Q4 2008
 Vipnet KPIs (Revenues, Operating Income, Subscriptions, ARPU & Market Share) Q4 2008 and y-o-y Comparison
 VimpelCom Mobile KPIs (Revenues, Subscriptions, ARPU & Market Share) (Russia) Q3 2007 to Q3 2008
 Turkcell KPIs (Revenues, Subscriptions & ARPU) Q3 2007, Q2 2008, Q3 2008, Q4 2008

China & Far East

China Mobile KPIs (Revenues, Subscriptions, ARPU & Traffic), 2007-2008
 China Unicom (GSM) KPIs (Revenues, Subscriptions & ARPU), 2007-2008
 NTT DoCoMo Wireless KPIs (Revenues, Subscriptions, ARPU & Market Share) Q3 2007 (December 2007) to Q3 2008 (December 2008)
 KTF KPIs (Revenues, Subscriptions, ARPU, Data Usage & Messaging)
 Bharti Airtel KPIs (Revenues, Subscriptions, ARPU & Market Share)
 Reliance Mobile KPIs (Revenues, Subscriptions, ARPU & Market Share) December 2007 to December 2008

Telenor Pakistan KPIs (Revenues, Subscriptions & ARPU)
Globe KPIs (Revenues, Subscriptions, Mobile Data & ARPU)

Rest of Asia

3 (Australia) KPIs (Revenues, Subscriptions & ARPU) Half Year and y-o-y Comparison
DiGi KPIs (Revenues, Subscriptions, Mobile Data & ARPU)
Telstra (Australia) KPIs ((Revenues, Subscribers & ARPU) Full Year Results and y-o-y Comparison
Vodacom KPIs (Revenues, Subscriptions, ARPU & Market Share) Six Months Ended September 30 2008 and y-o-y Comparison
Zain Group KPIs (Revenues & Subscriptions), 2007-2008
Zain (Jordan) KPIs (Revenues, Subscriptions, ARPU & Market Share), 2007-2008
Zain (Kenya) KPIs (Revenues, Subscriptions, ARPU & Market Share), 2007-2008
Zain (Nigeria) KPIs (Revenues, Subscriptions, ARPU & Market Share), 2007-2008
Zain (Uganda) KPIs (Revenues, Subscriptions, ARPU & Market Share), 2007-2008

Typical Messaging Costs per Message

VVO = Voice, Video & Other, IM = Instant Messaging, SVS + Short Verse Service.

North America

AT&T – Typical Messaging Costs per Message (SMS, MMS, Email, IM & Voicemail)
Helio 'A La Carte' – Typical Messaging Costs per Message (SMS, MMS, Email, IM & VVO)
Virgin Mobile USA – Typical Messaging Costs per Message (SMS, MMS, Email, IM & Video)

South America

Telcel – Typical Messaging Costs per Message (SMS, MMS, Web to SMS, Mobile Data & Voicemail)
Claro (Argentina) – Typical Messaging Costs per Message (SMS, MMS, Email, IM & Voice Messaging)
ENTEL – Typical Messaging Costs per Message (SMS, MMS, Email, Mobile Data, IM & SMS Messenger)
Telefonica Chile – Typical Messaging Costs per Message (SMS, MMS, Email, IM, Mobile Data, Voicemail & Voice Messaging)
Vivo – Typical Messaging Costs per Message (SMS, MMS, Email, IM & Data)

Western Europe

Vodafone Germany – Typical Messaging Costs per Message (SMS, MMS, Email, IM & Visual Mailbox)
Vodafone Portugal – Typical Messaging Costs per Message (SMS, MMS, Email & IM)
Telefonica Movistar (Spain) – Typical Messaging Costs per Message (SMS, MMS, Email, & IM)
O2 UK – Typical Messaging Costs per Message (SMS, MMS, Email, IM & Voicemail)
Telefónica O2 Czech Republic – Typical Messaging Costs per Message (SMS, MMS, Email, IM & Voicemail)

Eastern Europe

mobilkom austria – Typical Messaging Costs per Message (SMS, MMS, Email & IM)
Vipnet – Typical Messaging Costs per Message (SMS, MMS, Email, Data & Voicemail)
VimpelCom (Russia – Moscow) – Typical Messaging Costs per Message (SMS, MMS, IM & Voice Messaging)
Turkcell – Typical Messaging Costs per Message (SMS, MMS, Email, IM & Voice SMS)

China & Far East

China Mobile – Typical Messaging Costs per Message (SMS, MMS, GPRS, Email, IM, Voice & PIM)

China Unicom – Typical Messaging Costs per Message (SMS & MMS)

NTT DoCoMo – Typical Messaging Costs per Message (SMS, Email, Mobile Data & Chaku-moji)

KTF – Typical Messaging Costs per Message (SMS, MMS, Email, & Mobile Data)

Bharti Airtel – Typical Messaging Costs per Message (SMS, MMS, Email, IM, & Voice)

Reliance Mobile – Typical Messaging Costs per Message (SMS, MMS, Email, Alerts, IM, Talking Message & Voicemail)

Telenor Pakistan – Typical Messaging Costs per Message (SMS, MMS, Alerts, Email, Bubble Message & Backup)

Rest of Asia

3 (Australia) – Typical Messaging Costs per Message (SMS, Email, Mobile Data, IM, Video & Voicemail)

DiGi – Typical Messaging Costs per Message (SMS, MMS, Email, IM, BubbleTalk & Mobile Data)

Globe – Typical Messaging Costs per Message (SMS, MMS, Email, Mobile Data & IM)

Telstra – Typical Messaging Costs per Message (SMS, MMS, Email, & IM)

Etisalat – Typical Messaging Costs per Message (SMS, MMS, Email & Data)

Vodacom South Africa – Typical Messaging Costs per Message (SMS, MMS, Email, IM, Voicemail & SVS)

Zain (Jordan) – Typical Messaging Costs per Message (SMS, MMS, Email & Mobile Data)

Zain (Kenya) – Typical Messaging Costs per Message (SMS, MMS, Email & Mobile Data)

Zain (Nigeria) – Typical Messaging Costs per Message (SMS, MMS, Email & Mobile Data)

Zain (Uganda) – Typical Messaging Costs per Message (SMS & Voicemail)