

Advanced Messaging & Communications Intelligence Service

Part of the Digital Consumer Services Service Area Package

Global, in-depth coverage of all types of consumer communication platforms. Analysis of telco platforms including P2P and A2P SMS and RCS, and of the major OTT platforms including users, traffic and revenues.

“ Communications is entering a new visual era, with three out of five chat app users now regularly making video calls. The COVID-19 pandemic is accelerating the trend towards ingrained use of video calling among consumers. ”

Pamela Clark-Dickson
Principal Analyst

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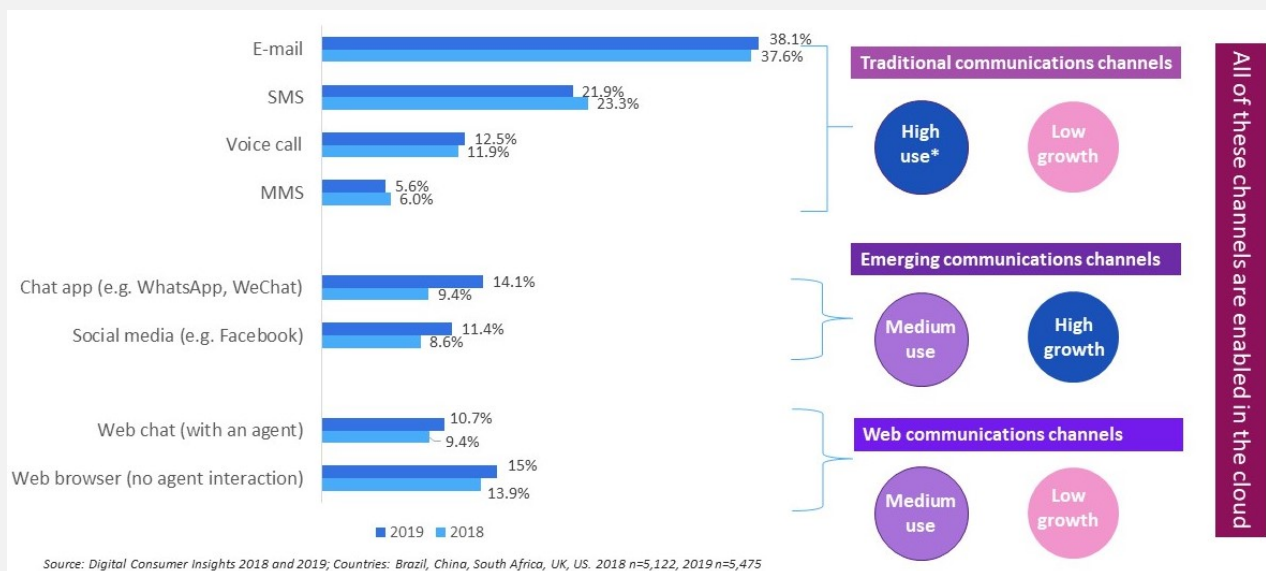
How consumers typically access customer care functions from service providers

HOW OMDIA HELPS YOU

- Size the telco and OTT messaging markets using country-level forecasts
- Size the consumer VoIP and video calling markets using country-level forecasts
- Track developments in the OTT Messaging, Social Media, and Enhanced Telco Communications Services markets using detailed data trackers
- Analyse multi-country surveys to identify how consumers use communications

KEY QUESTIONS ADDRESSED

- What is the size of the telco messaging market, for P2P and A2P SMS, and RCS?
- What is the size of the messaging app market, for users, traffic and revenues?
- Who are the key communications app players, and what is their market share for users and messaging traffic in key countries?
- How fast is app-based consumer VoIP and video calling growing, and who are the key players?
- How are key social media players addressing issues such as data privacy and the spread of misinformation on their platforms?
- What are the key platforms and technologies in the business-to-consumer messaging and communications market?
- What role does CPaaS play in B2C messaging and communications?



Advanced Messaging & Communications: Our Expert Analysts



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Advanced Messaging & Communications: Deliverables



MARKET DATA

—Annual/Bi-annual/Quarterly—

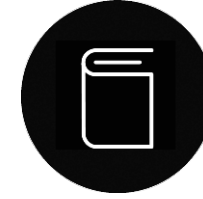
Forecasts: Messaging, VoIP, RCS, Social Trackers:
OTT Comms, Social, Enhanced Telco Comms



SURVEYS

—Annual—

Consumer communication apps and services



ANNUAL REPORTS

—Annual—

The Future of Comms
The Road to 2024



ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts,
technology and regional developments,
vendors, events, and more



THEMATIC REPORTS

—Ongoing—

Regular research reports based on core topic
themes and market events



ANALYST ACCESS

—Ongoing—

For prompt responses to
urgent and unique questions.

Advanced Messaging & Communications: Market Data & Analysis

OTT Communications Tracker

Global KPIs and two-year projections, news announcements and service overviews for key communications app players

DETAILS

Frequency: Bi-annual

Measures

- Registered users
- Monthly active users
- Messaging traffic
- Revenues (where available)
- Country splits for MAUs and messaging traffic by player

Regions

- Worldwide

COVERAGE

OTT Communications App Players

- Facebook – WhatsApp, Facebook Messenger, Instagram
- Tencent – WeChat
- Kakao Daum – KakaoTalk
- Line
- Apple – iMessage
- Microsoft – Skype
- Snap – Snapchat
- Rakuten Viber – Viber

OTT Messaging Forecasts

Worldwide, regional and country market sizing for OTT communications apps

DETAILS

Frequency: Annual

Measures

- Registered users
- Monthly active users
- Messaging traffic (text, picture, video)
- Mobile
- Fixed

Regions

- Africa
- Asia
- Europe
- Latin America
- Middle East
- North America
- Worldwide

COVERAGE

OTT Messaging Users

- Registered users
- Monthly active users

OTT Messaging Traffic

- Total
- Text
- Picture
- Video

Advanced Messaging & Communications: Market Data & Analysis

Mobile Messaging Traffic and Revenue Forecasts

Five-year forecasts for telco mobile messaging traffic and revenues

DETAILS

Frequency: Annual

Measures

- Messaging traffic
- Messaging revenues

Regions/countries

- Africa
- Asia
- Europe
- Latin & North America
- Middle East
- Worldwide

COVERAGE

- P2P SMS traffic
- P2P SMS revenues
- A2P SMS traffic
- A2P SMS revenues
- MMS traffic: picture, video

Consumer VoIP and Video Calling Forecasts

Five-year forecasts for consumer VoIP and video calling users and traffic (video calling new in 2020)

DETAILS

Frequency: Annual

Measures

- VoIP traffic
- VoIP users
- Video calling traffic
- Video calling users

Regions/countries

- Africa
- Asia
- Europe
- Latin & North America
- Middle East
- Worldwide

COVERAGE

Consumer VoIP

- VoIP traffic: domestic and international
- VoIP users: fixed and mobile

Consumer video calling

- Video calling traffic: domestic and international
- Video calling users: fixed and mobile

Advanced Messaging & Communications: Market Data & Analysis

Social Media Tracker

Global KPIs and two-year projections, news announcements and service overviews for key social players

DETAILS

Frequency: Bi-annual

Measures

- Registered users
- Monthly active users
- Revenues

Regions

- Worldwide

COVERAGE

Social media platforms

- Facebook
- Twitter
- Tencent – QQ
- LinkedIn
- Pinterest
- Tumblr
- Flickr
- Sina Weibo

Social Media Forecasts

Worldwide, regional and country market sizing for selected social media platforms

DETAILS

Frequency: Annual

Measures

- Monthly active users
- Revenues

Regions

- Africa
- Asia
- Europe
- Middle East
- Latin & North America
- Worldwide

COVERAGE

Social media platforms

- Facebook
- LinkedIn
- Twitter
- Pinterest
- Sina Weibo
- Tumblr

Advanced Messaging & Communications: Market Data

RCS Forecasts

Five-year forecasts for RCS installed base, traffic and revenues

DETAILS

Frequency: Annual

Measures

- RCS installed base
- RCS traffic
- RCS revenues

Regions

- Africa
- Asia
- Europe
- Middle East
- Latin & North America
- Worldwide

COVERAGE

- RCS installed base: P2P and A2P
- P2P RCS traffic: Text, picture and video
- A2P RCS traffic: one-way rich alerts and notifications, two-way transactional alerts and notifications; security, fraud prevention and authentication
- A2P RCS revenues

Enhanced Telco Communications Tracker

Operators' commercial launches of VoLTE, Wi-Fi calling, voice over Wi-Fi (VoWiFi), Rich Communications Services (RCS), and Web Real-Time Communications (WebRTC)

DETAILS

Frequency: Quarterly

Measures

- VoLTE and ViLTE
- Wi-Fi Calling
- Voice over Wi-Fi
- RCS
- WebRTC

Regions

- Africa
- Asia
- Europe
- Middle East
- Latin & North America
- Worldwide

COVERAGE

- Launch dates
- Service status
- Product names
- Pricing models
- Operator summary

Advanced Messaging & Communications: Report

The Future of Consumer Communications

Providing detailed analysis around the continuing development of communications apps and services

DETAILS

Frequency: Annual

This report explores topical developments in-depth, such as 5G and video communications. It is based on interviews with key stakeholders in the communications apps and services market, including Tier 1 telcos and vendors. It also uses data and insights drawn from Digital Consumer Insights surveys, market trackers, and forecasts.

Advanced Messaging & Communications: 2020-21 Research Themes

Mapping the new communications landscape

Providing detailed analysis around the continuing development of communications apps and services

Series of reports and trackers evaluating chat apps as they continuing their march towards world domination. App-based messaging is nearing saturation levels in many markets, and chat app users have seized on video as their new favourite way to communicate. The use of video communications has soared during the Covid-19 pandemic, and Omdia expects that video comms will remain an important channel for consumers after social and travel restrictions ease. The fragmentation of chat apps means that telco voice and SMS persist, paving the way for telecom companies to also succeed with RCS. In 2020, Omdia will focus on the continuing evolution of telco and OTT communications, exploring the implications for consumers and the wider industry, and underpinning its analysis with forecasts, trackers, and consumer surveys.

Vendors are the lynchpin of the new communications world

Assessing how vendors and service providers are evolving to meet market challenges.

The pressures on communications vendors and service providers have never been higher. Telcos expect more for less. To generate additional revenue, vendors and service providers have to demonstrate commensurate value. In 2020, Omdia will continue to track developments in the vendor and service provider market, assessing the strategies of CPaaS providers, SMS aggregators, and others.

The rich new world of A2P communications

Analyzing how changing communications behaviors drive adaptation in the platforms underpinning B2C interactions.

SMS aggregators and vendors are providing enterprises with more choices than ever in how they communicate with consumers, while adapting their platforms to keep pace with how consumers' communications behaviors are changing. Enabling enterprises to access new channels for application-to-person (A2P) communications has implications for telecoms companies as well. In 2020, Omdia will continue to analyse the A2P market, tracking and evaluating the role of RCS within the context of SMS and chat apps, and assessing the strategies of the key stakeholders as they transition to providing richer communications.

Social media platform strategies

Evaluating the market sizing and go-to-market strategies of key social media players

Social networks are now an intrinsic part of consumers' lives. However, they are always evolving to add new and better services, monetization features, and infrastructure, making them a moving target to compete or partner with. Their challenges, which range from regulation to data security and privacy, as well as consumer protections, are similarly shifting. In 2020, Omdia will track and analyze social media players as well as evaluate the size of the global social media market.

Related Content: Digital Consumer Services Service Area Coverage



Service Area Package: **Digital Consumer Services**

Broadband, Bundling & Pricing
Intelligence Service

Smart Home
Intelligence Service

Advanced Messaging &
Communications Intelligence Service

Digital Consumer Platforms
Intelligence Service

Digital Consumer Operator Strategy
Intelligence Service

Consumer AI
Intelligence Service

Digital Consumer Services Viewpoint Service

Broadband Pricing
Spotlight Service

About Omdia's Digital Consumer Services Research

Omdia provides expert analysis and data across Digital Consumer Services with unique coverage of service providers', over the top players', and major tech platforms' activity in this space. We can help identify which markets and offerings are driving growth in Digital Consumer Services, understand the strategies of key competitors and customers, and assess the impact of this rapidly evolving market across different businesses.

Our global team of analysts provides expertise on service provider and tech company strategy across Digital Consumer services including: broadband and bundling, messaging and communications, consumer platform strategies, digital operator services, app ecosystems, payments and commerce, smart home, and consumer AI.

Custom Solutions

Omdia's consulting services offer a true end-to-end service capability across all aspects of your product lifecycle, from concept and product development, to go-to-market and sales effectiveness. **Contact us** if you have a project that you would like to discuss with a member of the team.

Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

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ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.