WINTERGREEN RESEARCH, INC.

U.S. Wireless Service Provider Market Opportunities, Strategies, and Forecasts, 2004 to 2009

U.S. Wireless Service Provider

Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

WinterGreen Research, Inc.
Lexington, Massachusetts www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

U.S. WIRELESS SERVICE PROVIDER MARKETS

U.S. WIRELESS SERVICE PROVIDER MARKET FORECASTS

REASONS FOR WIRELESS SERVICE PROVIDER INDUSTRY CONSOLIDATION

Cingular-AT&T Wireless Deal Impact on Other Market Participants

Wireless Service Market Penetration

Restructuring the Network for Advanced Multimedia Services

CONSOLIDATION IN THE WIRELESS COMMUNICATIONS INDUSTRY

PUSH TO TALK MARKET DEFINITION

WIRELESS INDUSTRY TRENDS

WIRELESS NETWORKS

MOBILE-TO-MOBILE CALLING

THIRD-GENERATION (3G) PHONE SERVICES

WIRELESS DATA

INSTANT MESSAGING

TEST VOTING

SIP

OPPORTUNITY ABOUNDS

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Wireless industry consolidation is occurring because it is more efficient to have national coverage. Companies need to have broad coverage to be profitable and to avoid churn. Bundling is a market factor. Companies want to sell customers more than one type of communications solution.

Cingular complemented the AT&T network rather than competing with it. The economies of scale and of eliminating duplication of executives and services people made sense. With Verizon in the picture, there is still intense competition. Voice over IP promises to provide an alternate technology.

The combined Cingular-AT&T Wireless, which will take the Cingular name, will have wireless networks that cover 49 states and will have annual revenue of more than $32 billion. Cingular estimates that the merger will save the combined company $2 billion to $3 billion a year starting in 2006, in part through thousands of layoffs of overlapping positions.

U.S. wireless service provider markets consist of server, advertising, subscription services, and online music segments. The equipment segments will grow at a steady pace while the content delivery segments will grow significantly more rapidly.

There are significant growth opportunities in the wireless industry. The U.S. wireless penetration rate continues to climb. With a penetration rate only slightly greater than 50%, a significant source of potential customers is represented in the un-penetrated portion of the U.S. population.

It is anticipated that worldwide wireless subscriber penetration for developed countries will reach 92% and for undeveloped countries will be 45%. Prepaid plans are expected to account for virtually all the growth left in the market. Wireless telephones will replace landline narrowband phones to a great extent. Landline services will provide broadband capability.

An opportunity for growth lies in the substitution of wireless for wire line minutes. The wireless share of outbound minutes grew from 11% in 2001 to 15% in 2002 and to 20% in 2003. The wire line to wireless migration is anticipated to continue.

U.S. wireless service provider markets at $100 billion in 2003 are expected to reach $188.4 billion by 2009.

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Companies Profiled

Market Leaders

Cingular/AT&T Wireless
Verizon
Sprint

Other Market Participants

ALLTEL	America Movil
America Online	Cable & Wireless
Deutsche Telekom	Leap
Nextel Communications	NTT Docomo
Qwest	SBC
TELUS Mobility	U.S. Cellular
Vodaphone	Western Wireless

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REPORT METHODOLOGY

THIS IS THE *TWO-HUNDRED AND TENTH* REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, AND TELEPHONE EQUIPMENT. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT.

YOU MUST HAVE THIS STUDY

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT WILL EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULITPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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