

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**

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95 TABLES AND FIGURES

2004

\$2,800

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.

Companies Profiled

Market Leaders

Cingular/AT&T Wireless

Verizon

Sprint

Other Market Participants

ALLTEL

America Online

Deutsche Telekom

Nextel Communications

Qwest

TELUS Mobility

Vodaphone

America Movil
Cable & Wireless

Leap

NTT Docomo

SBC

U.S. Cellular
Western Wireless

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

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

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

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