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BMI Global Handset Markets: Key Trends and Opportunities 2007-2014

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Abstracts

Sales Improved Affordability And Performance Driving Sales

The global market for mobile telephone services is the largest and, arguably, the fastest-growing segment of the telecommunications industry. After the earliest analogue-based networks went live in the mid-1980s, it took almost a decade for mass-market adoption momentum to be achieved and, more than a decade later, that momentum seems far from spent. BMI's databases recorded a total of 4.628bn mobile subscribers at the end of 2009, a figure we expect to almost double to 8.134bn by the end of 2014.

Those countries that became early adopters of the mobile phone appear–on the face of it–to be all but tapped-out in terms of growth opportunities, with operators looking to target an increasingly youthful market for organic subscriber additions while poaching customers from their rivals through aggressive pricing and elaborate product bundling initiatives. The recent emergence of the mobile applications ('apps') store has given a new lease of life to mature markets, allowing operators to tap into new and vibrant revenue streams based on an ever-broadening array of value-added content and services.

However, BMI's forecasts underline the fact that significant organic growth opportunities remain unexploited in many of the world's emerging markets, particularly where operators have traditionally been reluctant to step into rural, remote and economically deprived areas. To be sure, those operators that choose to do so will find it difficult to make profit on the same scale they have been used to seeing in more affluent markets. But their rewards for making these ostensibly risky investments will come from helping low-income users transform their social standing, impacting on their local economy and so drive future revenues.

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The accompanying chart shows BMI's forecasts for mobile subscriber growth over the next five years. It clearly demonstrates that Asia and Africa offer the greatest potential for expansion over the period in question, as many new networks begin to be rolled out across both continents.

It is, perhaps, unsurprising that Asia should show the steepest projected rate of growth, despite the fact that the region is largely better served by successful operators. There is a huge number of people that currently do not own a mobile phone simply due to the fact that owning a handset is often, in itself, beyond their means. Actively using basic and value-added services is even further beyond their means.

This is why handset manufacturers, such as Nokia, are striving to make their products as affordable as possible. Essentially, more affordable handsets means greater sales volumes (though not necessarily greater revenues from handset sales).

Getting those handsets into the hands of low-income consumers is one thing–encouraging them to spend what little income they have to spare on basic and value-added services is another. And, here, Nokia is also leading the way, by incorporating simple software-based services that give users access to essential life tools, such as weather, financial, location and education services germane to those users' lifestyles and geographic locations.

Nokia is increasingly positioning itself as a service provider, allowing it to offset any losses it makes from selling ultra low-cost handsets by deriving revenues from access to its software-based information services. It partners with local content providers (banks, media, local government, etc) to obtain the content and services are delivered over local networks. This leaves operators in the uncomfortable situation of acting as mere 'dumb pipes' but does, at least, give them the opportunity to earn revenue from the traffic carried over their networks and maybe to entice users onto their premium value-added service platforms.

Nokia is having to change tactics in order to survive the onslaught of a host of new competitors. On the one hand, it is attempting to ramp-up the quality of its high-end devices, or smartphones, as these products increasingly appeal even to casual mobile phone users in developed markets. The appeal of mobile applications to improve the mobile internet experience is also a key selling point and Nokia has launched its Ovi-branded mobile store, to some degree of success.

On the other hand, though, Nokia is all too aware that operators' efforts to tap the underserved low-income and rural consumer markets in Asia, Africa and Latin America needs the support of a low-cost device portfolio. The company is, therefore, actively championing some of the most affordable products on the market.

This reflects the sector's polarisation into high-end and low-end products and, as such, Nokia should continue to do well in the years ahead, despite heightened competition in the smartphone market and growing dissatisfaction (from the technical community rather than the user community, it has to be said) with Nokia's refusal to use an operating system other than its tried and trusted Symbian platform, a flirtation with the Meego OS for mobile computing notwithstanding.

Clearly, the market has changed enormously in the last three years, and Nokia cannot afford to rest on its laurels either in the smartphone arena or in the low-cost handsets field. Its principal challenge does from from the OS front, though, as this and the handset user interface (UI) are often the key elements that can persuade a consumer to take a particular handset.

Symbian–despite going open source and receiving a number of upgrades, not least of which will include the facility to make contactless transactions in the Symbian^4 platform–is showing its age and is often passed over in favour of the rather more glamorous Apple OS, found on its highly popular music player, iPod, and now on its iPhone and iPad wireless devices. A direct connection to the highly user friendly Apple application store ('app store') only serves to enhance the iPhone family's attractiveness to anyone even remotely familiar with smartphones and computers.

But it is another open source OS that is stealing all the thunder at the moment. The Android OS has been developed by internet search giant Google and a host of handset vendors and its use on a rapidly-growing range of devices, coupled with a well-established app store of its own, has ensured that Android-powered devices are outselling iPhones at a spectacular rate. Floundering Motorola has found its salvation in Android, with a revamped smartphone portfolio behind its recent return to form and improved prospects for the spin-off its handset division in 2011. Samsung, LG Electronics and former white label device maker HTC have all done very well out of Android, too.

Buoyed by the popularity of smartphone OSs and application stores, Samsung and computer-maker Lenovo have developed platforms of their own, with Samsung's Bada set to arrive in the second half of 2010 and Lenovo backing the Chinese OPhone

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system. And HTC's success in transforming itself into a major original equipment manufacturer has prompted China's telecoms equipment makers ZTE, Huawei and the GFive group onto the international stage with handsets of their own.

The times are changing, but perhaps not as fast as the handset sector.

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