

Mobile Value-added Services Market – Global Industry Size, Share, Trends, Opportunity, and Forecast. Segmented By Solution (Short Messaging Service (SMS), Multimedia Messaging Service (MMS)), By Location Based (Services, Mobile Email & IM, Mobile Money, Mobile Advertising, Mobile Infotainment, Others), By End-User (SMB, Large Enterprises), By Vertical (Media and Entertainment, Healthcare, Education, Retail, Government, Telecom and IT, Others), By Region, By Company and By Geography, Forecast & Opportunities, 2018-2028.

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Abstracts

The Global Mobile Value-added Services Market was valued at USD 650 Billion in 2022 and growing at a CAGR of 13.1% during the forecast period. The Global Mobile Value-added Services (MVAS) Market is currently experiencing significant growth and transformation driven by the rapid proliferation of mobile devices and the evolving demands of consumers worldwide. MVAS encompasses a wide range of services beyond voice and data communication, including mobile entertainment, mobile banking, mobile healthcare, and more. This market expansion is primarily attributed to several key factors. Firstly, the widespread adoption of smartphones and increasing mobile internet penetration have created a fertile ground for MVAS providers. Consumers today seek more than just basic communication services, leading to a surge in demand for value-added services that enrich their mobile experiences. Furthermore, the COVID-19 pandemic accelerated the adoption of MVAS, especially in sectors like telehealth, online education, and digital entertainment, as individuals and businesses alike turned to

mobile platforms for convenience and accessibility. The integration of advanced technologies like 5G and IoT is also catalyzing MVAS growth, enabling new possibilities such as augmented reality applications, smart cities, and IoT-driven services. As mobile networks become more robust and pervasive, the MVAS market is poised for further expansion and innovation.

Key Market Drivers

Evolving Technological Landscape

The Global Mobile Value-added Services (MVAS) Market is experiencing significant growth driven by the ever-evolving technological landscape. This dynamic environment is characterized by continuous advancements in mobile technology, including the rollout of 5G networks, the integration of artificial intelligence (AI), augmented reality (AR), and virtual reality (VR) applications, and the proliferation of IoT devices. As these technological innovations reshape the mobile ecosystem, MVAS providers are seizing new opportunities to offer innovative and value-added services that leverage these cutting-edge technologies. For instance, the deployment of high-speed 5G networks is enabling MVAS providers to offer high-definition streaming, low-latency gaming experiences, and augmented reality applications that were previously unattainable. AI-driven virtual assistants are enhancing customer service and personalization, while IoT connectivity and data analytics are facilitating smart home and industrial automation solutions. This rapid pace of innovation not only caters to evolving consumer demands for more sophisticated and personalized mobile experiences but also fosters fierce competition among MVAS providers, driving them to continually innovate and develop new services that leverage the latest technological advancements. In this landscape, the MVAS market stands as a critical driver of innovation, acting as a conduit for emerging technologies to reach consumers and businesses, thereby shaping the future of mobile services and the broader digital landscape.

Enhanced Security and Privacy Concerns

Enhanced security and privacy concerns are compelling drivers behind the surge in the Global Mobile Value-added Services (MVAS) Market. In an era marked by escalating cybersecurity threats and growing apprehensions about data privacy, consumers and businesses alike are prioritizing the security of their mobile experiences. MVAS providers, cognizant of these concerns, have responded by offering a spectrum of security-focused services. From secure authentication mechanisms, robust encryption protocols, and biometric authentication for mobile payments to data encryption solutions

for confidential communication, MVAS companies are fortifying their offerings to ensure the protection of sensitive information. Moreover, as industries like mobile banking and healthcare increasingly rely on mobile platforms for sensitive transactions and health data management, the demand for secure MVAS is soaring. These services not only safeguard users' personal and financial information but also build trust and confidence in mobile technology. As regulatory bodies globally tighten data protection laws, such as GDPR and CCPA, MVAS providers that prioritize security and privacy compliance are gaining a competitive edge. This commitment to data security and privacy not only addresses the growing concerns of consumers and businesses but also stimulates research and development efforts, pushing the MVAS market to innovate continually in the realm of secure and private mobile experiences. In this landscape, the MVAS market becomes a critical enabler of secure mobile interactions, positioning itself as a driving force in the global quest for heightened security and data privacy in the digital age.

IoT Integration and Connectivity

IoT integration and connectivity are pivotal drivers propelling the Global Mobile Value-added Services (MVAS) Market into a transformative era. As the Internet of Things (IoT) ecosystem expands across various industries, MVAS providers find themselves at the heart of this digital revolution. The proliferation of IoT applications, spanning smart homes, connected vehicles, industrial automation, and more, demands seamless integration and connectivity services offered by MVAS. These services enable real-time data collection, analysis, and communication between IoT devices, unlocking unprecedented levels of automation, efficiency, and intelligence. MVAS components, such as IoT connectivity solutions, data analytics platforms, and application enablement, empower businesses to harness the full potential of IoT, facilitating the creation of smart cities, predictive maintenance in manufacturing, and enhanced healthcare monitoring. This symbiotic relationship between MVAS and IoT creates a virtuous cycle of demand and innovation, as the IoT's rapid growth fuels the MVAS market, while MVAS capabilities enhance the transformative potential of the IoT. As industries increasingly leverage the power of connected devices and data-driven insights, the MVAS market remains a fundamental player in shaping the future of digital connectivity and intelligent automation across the global landscape.

Rising Consumer Expectations

Rising consumer expectations serve as a powerful driving force behind the Global Mobile Value-added Services (MVAS) Market, propelling it into a dynamic era of

innovation and growth. Modern consumers, armed with increasingly sophisticated mobile devices, demand more than just basic voice and data services from their mobile providers. They seek personalized, convenient, and enriching mobile experiences that cater to their individual preferences and lifestyles. In response, MVAS providers are expanding their service offerings to include a wide array of value-added services, such as mobile entertainment, mobile payments, content streaming, and personalized recommendations. These services not only enhance the overall user experience but also foster deeper engagement and loyalty. As consumers rely on their mobile devices for communication, entertainment, information, and even financial transactions, their expectations for seamless, feature-rich services continue to rise. This evolution not only drives the growth of the MVAS market but also fuels intense competition among providers, pushing them to innovate continually and develop new, customer-centric solutions. In this landscape, consumer expectations serve as a catalyst for industry advancements, prompting MVAS providers to deliver increasingly innovative, convenient, and tailored services that meet the evolving needs of a tech-savvy and demanding consumer base. This dynamic cycle of expectation and innovation solidifies MVAS as a pivotal driver in shaping the future of mobile services worldwide.

Key Market Challenges

Technological Fragmentation and Compatibility Issues

The Global Mobile Value-added Services (MVAS) Market faces significant challenges arising from technological fragmentation and compatibility issues. As the MVAS landscape evolves with diverse services and platforms, achieving seamless integration and compatibility across different devices, operating systems, and networks becomes a complex endeavor. Consumers expect a consistent and unified experience across their mobile devices, but varying standards, protocols, and device capabilities often hinder this. MVAS providers must invest in extensive testing, adaptation, and development efforts to ensure their services function seamlessly across the broad spectrum of mobile devices, operating systems, and network infrastructures. Overcoming these challenges is pivotal for delivering a unified and user-friendly MVAS experience, fostering consumer satisfaction and market growth.

Data Security and Privacy Concerns

Ensuring robust data security and privacy protections in MVAS presents a critical challenge. As MVAS providers collect and process substantial volumes of sensitive user data for services such as mobile payments, location-based services, and personalized

recommendations, they become prime targets for cyberattacks and data breaches. Strict regulatory frameworks, like GDPR and CCPA, further raise the stakes for MVAS companies, necessitating comprehensive data protection measures. To address this challenge, MVAS providers must invest in state-of-the-art cybersecurity solutions, conduct regular security audits, and implement stringent data protection policies. Balancing the delivery of personalized services with stringent data privacy and security requirements is essential to maintain consumer trust and meet regulatory compliance, thereby shaping the MVAS market's future.

Monetization Strategies in a Competitive Market

The MVAS market faces the ongoing challenge of developing effective monetization strategies in a highly competitive landscape. As the market offers an array of services, including free and premium options, finding the right balance between revenue generation and customer acquisition and retention becomes complex. MVAS providers need to identify sustainable revenue models that align with consumer expectations and market dynamics. This challenge is exacerbated by the presence of ad-blockers, consumer aversion to intrusive advertising, and the need for transparent pricing structures. Success in this regard hinges on a deep understanding of consumer preferences, agile business models, and innovative monetization strategies that cater to diverse consumer segments while ensuring sustainable growth and profitability in the MVAS market.

Content Licensing and Intellectual Property

Content licensing and intellectual property issues present a significant challenge within the MVAS market. As providers offer a plethora of content-based services, securing the necessary licenses and respecting intellectual property rights become paramount. Failure to address these challenges can lead to legal disputes, content restrictions, and potential reputational damage. MVAS providers must navigate a complex web of content licensing agreements, negotiate terms with content creators, and implement robust systems for content protection and rights management. Successfully addressing these challenges ensures a consistent supply of quality content while safeguarding against legal and reputational risks, bolstering the MVAS market's resilience and growth.

Key Market Trends

Personalized Mobile Experiences

A significant and transformative trend shaping the Global Mobile Value-added Services (MVAS) Market revolves around the delivery of personalized mobile experiences. As consumer preferences become increasingly diverse and discerning, MVAS providers are focusing on tailoring their services to individual user preferences. This trend is driven by the desire to provide users with more than just generic content and services. Personalization encompasses areas such as personalized content recommendations, location-based services, and customized mobile advertising. MVAS providers are harnessing the power of data analytics and AI to understand user behavior and preferences, ensuring that the services delivered are relevant, engaging, and valuable to each user. This trend not only enhances user satisfaction but also drives customer retention and loyalty, positioning personalization as a central driver of growth in the MVAS market.

5G-Powered Services

The integration of 5G technology represents a prominent trend that is significantly impacting the Global Mobile Value-added Services Market. As 5G networks continue to expand globally, MVAS providers are capitalizing on the unprecedented speed, low latency, and network capabilities that 5G offers. This trend has given rise to a new era of MVAS, enabling services such as high-definition video streaming, augmented reality (AR) and virtual reality (VR) experiences, and real-time IoT connectivity that were previously constrained by network limitations. The increased bandwidth and network efficiency of 5G empower MVAS providers to deliver richer, more immersive, and real-time services, opening up opportunities in sectors such as gaming, telemedicine, and remote collaboration. The widespread rollout of 5G networks is driving MVAS innovation and adoption, positioning it as a key enabler of next-generation mobile services.

Enhanced Data Privacy and Security

Ensuring robust data privacy and security measures is a crucial trend within the MVAS market. As consumers become more aware of data privacy concerns and governments enact stringent data protection regulations, MVAS providers are prioritizing security and privacy in their offerings. This trend involves the implementation of advanced encryption, biometric authentication, and secure data storage practices to safeguard user information. MVAS providers are also focusing on transparent data usage policies and compliance with data protection laws such as GDPR and CCPA. By addressing data security and privacy concerns comprehensively, MVAS providers build trust with their users and mitigate the risk of data breaches, contributing to the market's growth

and credibility.

IoT Integration and Smart Homes

The integration of Internet of Things (IoT) technology and the development of smart homes is a prominent trend shaping the MVAS market. As smart home adoption grows, MVAS providers are offering services that facilitate the management and control of IoT devices and systems through mobile applications. This trend includes services like remote home monitoring, energy management, and smart security solutions. MVAS providers are playing a pivotal role in creating seamless connectivity between mobile devices and smart home ecosystems, enhancing convenience, energy efficiency, and security for consumers. With the continued expansion of smart home technologies, this trend is set to drive MVAS innovation and adoption, making mobile devices central to the management of smart homes.

Segmental Insights

Solution Insights

The Short Messaging Service (SMS) segment emerged as the dominant type segment in the Global Mobile Value-added Services (MVAS) Market, and it is anticipated to maintain its supremacy throughout the forecast period. SMS has remained a cornerstone of mobile communication for decades, offering a ubiquitous and cost-effective means of text-based communication. While newer messaging platforms and multimedia services have gained popularity, SMS continues to be a vital part of everyday mobile interactions, particularly in business, customer engagement, and critical notifications. Its simplicity, reliability, and wide-ranging compatibility across all mobile devices have contributed to its sustained dominance. Additionally, SMS-based MVAS applications, such as two-factor authentication (2FA), SMS marketing, and SMS-based customer support services, continue to be essential for various industries, including banking, e-commerce, and healthcare, further solidifying the SMS segment's prominence. While Multimedia Messaging Service (MMS) and other multimedia-based services have their place in the MVAS ecosystem, SMS remains the preferred and widely adopted choice for many essential mobile communication needs, ensuring its continued dominance in the market.

Location Based Insights

The Location-Based Services (LBS) segment asserted its dominance in the Global

Mobile Value-added Services (MVAS) Market, and this trend is expected to persist throughout the forecast period. LBS, which leverages a user's geographical location to provide relevant and personalized services, has witnessed substantial growth due to its wide-ranging applications across various industries. Industries such as retail, transportation, and tourism have extensively adopted LBS to offer location-based marketing, navigation, and customer engagement services. Furthermore, the integration of LBS with emerging technologies like augmented reality (AR) and IoT has expanded its potential, making it a cornerstone for smart cities, asset tracking, and proximity-based advertising. The growing reliance on mobile devices for navigation, local recommendations, and location-based notifications has further fueled the dominance of the LBS segment. While other MVAS segments, such as mobile advertising and mobile infotainment, continue to thrive, the versatility and real-world applicability of LBS across numerous domains position it as the frontrunner and an enduring leader in the MVAS market.

Vertical Insights

The Telecom and Information Technology (IT) segment emerged as the dominant vertical in the Global Mobile Value-added Services (MVAS) Market, and this dominance is expected to persist throughout the forecast period. The Telecom and IT sector plays a foundational role in enabling and delivering MVAS to consumers and businesses worldwide. With the continuous evolution of mobile technology and the increasing reliance on mobile devices for communication, connectivity, and data access, the Telecom and IT industry remains at the forefront of the MVAS landscape. Services such as mobile data plans, mobile broadband, and voice services are essential components of this vertical, serving as the backbone for all MVAS offerings. Moreover, as the demand for innovative and data-intensive MVAS, including 5G-powered applications and IoT connectivity, continues to surge, the Telecom and IT sector is uniquely positioned to cater to these requirements. Its widespread infrastructure and expertise in network management, security, and data analytics ensure its continued dominance in delivering a wide array of MVAS to diverse consumer segments and industries. While other verticals such as Media and Entertainment, Healthcare, and Retail also play vital roles in the MVAS market, the Telecom and IT segment's enduring significance and pivotal role in enabling mobile services ensure its continued dominance.

Regional Insights

The Asia-Pacific (APAC) region emerged as the dominant force in the Global Mobile Value-added Services (MVAS) Market, and it is poised to maintain its dominance

throughout the forecast period. APAC's leadership in the MVAS market is driven by several key factors. Firstly, the region boasts a massive and rapidly growing mobile subscriber base, with countries like China and India leading the way. This sheer scale of mobile users presents a substantial market for MVAS providers to offer a wide array of services, from mobile payments and entertainment to e-commerce and healthcare solutions. Secondly, APAC has been at the forefront of mobile technology adoption and innovation, with a robust ecosystem of mobile app developers and tech companies. Emerging economies in the region have leapfrogged traditional infrastructure, embracing mobile as a primary platform for communication, commerce, and entertainment. The rollout of 5G networks across APAC nations further accelerates the adoption of data-intensive MVAS, such as high-definition streaming, augmented reality (AR), and Internet of Things (IoT) applications. Additionally, the dynamic and diverse markets within APAC provide a fertile ground for testing and scaling MVAS offerings. Mobile advertising, mobile payments, and mobile-based e-commerce platforms have thrived in this region, catering to the diverse preferences and needs of consumers across different countries. Furthermore, governments in APAC have been supportive of the MVAS industry, implementing favorable regulatory frameworks and initiatives that encourage digital innovation and mobile service expansion. All these factors combined make APAC the dominant region in the Global MVAS Market, with its influence set to grow as mobile technology continues to evolve and shape consumer behavior and business practices across the region.

Key Market Players

Reliance Industries Ltd.

One97 Communications

Apple Inc.

Huawei Investment & Holding Co. Ltd.

Comviva Technologies

Vodafone Group plc

OnMobile Global Limited

Mozat Pte Ltd

Alphabet Inc.

Samsung Electronics Co. Ltd.

Report Scope:

In this report, the Global Mobile Value-added Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Mobile Value-added Services Market, By Solution:

Short Messaging Service (SMS)

Multimedia Messaging Service (MMS)

Global Mobile Value-added Services Market, By Location Based:

Services

Mobile Email & IM

Mobile Money

Mobile Advertising

Mobile Infotainment

Others

Global Mobile Value-added Services Market, By End-User:

SMB

Large Enterprises

Global Mobile Value-added Services Market, By Vertical:

Media and Entertainment

Healthcare

Education

Retail

Government

Telecom and IT

Others

Global Mobile Value-added Services Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Mobile Value-added Services Market.

Available Customizations:

Global Mobile Value-added Services Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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15.10.1. Business Overview

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15.10.4. Key Personnel

15.10.5. Key Product/Services Offered

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