

# OTT Communications (WhatsApp, Skype, WeChat): Demand, Sales, Competitor and Forecast 2016 – 2021

*OTT Communications  
(WhatsApp, Skype, WeChat) Global Market  
2016 Analysis and Forecast to 2021*

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Over the top (OTT) messaging leaders is rapidly evolving their key mobile messaging application interfaces to new voice and video communications, with revenue dilution implications for carriers worldwide. The progress made in mobile IP voice and video in the past year alone from key OTT players such as Facebook and Google is a clear indication of heightened mobile communications competitive pressure from these new players in 2016 and beyond. OTT players are transforming their communications apps into rich media platforms that serve as social networking hubs, offering a number of media services. Apps built on top of messaging enable users to solve broad problems. Messaging becomes a hub for consuming content and making transactions. Still, we argue that OTT communications providers need partnerships with carriers, to garner scale and differentiation.

## Key Findings

- The strategy of most, if not all, OTT messaging providers is to gain scale first and then monetize. All communications OTT apps with global aspirations are in a race to become the biggest platform in order to attract developers, which in turn should add more value to an offering.
- OTT players are transforming their communications apps into rich media platforms that serve as social networking hubs, offering a number of media services. Apps built on top of messaging enable users to solve broad problems. Messaging becomes a hub for consuming content and making transactions.



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REPORTS

Norah Trent Partner Relations & Marketing Manager

✉ sales@wiseguyreports.com

☎ Ph: +1-646-845-9349 (US) Ph: +44 208 133 9349 (UK)

🌐 <https://www.linkedin.com/company/4828928>

🐦 <https://twitter.com/WiseGuyReports>

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- LINE Messenger and WeChat are the few OTT communications players to demonstrate revenue. They can serve as a blueprints for other players.
- Messaging apps have significantly eroded carriers' revenue from previous cash generators such as SMS services. The threat to carriers is increasing with the migration of voice calls from carriers to VoIP providers such as Skype and WhatsApp.
- WhatsApp and Facebook Messenger represent the most disruptive OTT communications players in the market. Monetization could be highly disruptive.
- A number of partnership opportunities are emerging as carriers are growing convinced that they can generate revenue from OTT communications. The challenge lies in business tie-ups and infrastructure capabilities.

## Synopsis

“Over-the-top communications services: Emerging monetization paths” offers an analysis of the state of the OTT communications market, the market drivers, and a number of company initiatives that highlight how market players are moving toward monetization. We highlight a number of monetization strategies and case studies employed by the world's largest OTT communications players. We also look at how carriers are impacted by OTT communications providers and how they can partner with key players to drive revenue. We conclude with recommendations for OTT companies and carriers.

The Report is structured as follows:

Section 1: Market context. This section provides an overview of the OTT communications providers along with the competitive landscape and recent acquisitions and investments in OTT messaging app market. It also provides details on key OTT communications features and information on these communications apps are now evolving into powerful digital platforms.

Section 2: Emerging monetization strategies. Here we explore the various monetization strategies adopted by the major OTT communications companies globally.

Section 3: OTT communications case studies. The report includes six case studies: Facebook Messenger, Line, Viber, WeChat, Snapchat and WhatsApp. Each case study offers detailed analysis of the trajectory and approach taken by OTT service providers for generating revenues along with the progress made in recent years.

Section 4: Key findings and recommendations. We conclude with a summary of our findings on the emerging monetization paths adopted by various OTT service providers around the world, as well as specific recommendations for network carriers and OTT service providers looking to increase their revenue and develop partnerships in the OTT arena.

## Reasons to Buy

- Assess revenue models for OTT communications services and learn what works and what doesn't.
- Learn effective strategies for minimizing the adverse impact of OTT communications services on mobile carrier business
- Examine the business case for OTT/carrier partnerships

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Norah Trent

wiseguyreports

+1 646 845 9349 / +44 208 133 9349

[email us here](#)

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