



insights into **mobile spam**

World's First Collaborative Empirical Study

February 2005

Worldwide, the number of mobile messages and respective services show tremendous growth rates. Mobile network operators, application service providers and infrastructure vendors reap significant, high margin revenues from these services. No wonder, the telecommunication industry increasingly invests in rich media messaging and derivative business models.

However, the growing concerns about unsolicited messaging, so called spam, puts these opportunities at risk. Regulatory authorities issue directives for stricter privacy protection, customers express signs of dissatisfaction.

This joint study of the University of St. Gallen, Switzerland, bmd wireless, International Telecommunication Union (ITU) and other leading Universities collects data from eight key countries based on more than 1'600 responses on the consumer and the supplier side. It produces an overview on the current status of the mobile spam phenomenon. Furthermore, it analyses the effectiveness of various counter measures and derives recommendations for all players on how to meet customer expectations.

Copy Right

www.mobilespam.org

Switzerland - 2005

AUTHORS & CONTACTS



Torsten Brodt

=mcm*institute*, University of St. Gallen, Switzerland
Torsten.Brodt@unisg.ch



János Heé

bmd wireless AG, Zug, Switzerland
Janos.Hee@bmdwireless.com

CONTRIBUTORS



Lara Srivastava

International Telecommunication Union (ITU), Switzerland



Shahiraa Binti Sahul Hameed

Singapore Internet Research Center (SIRC)
Nanyang Technological University, Singapore



Lan Jun

Tongji University Shanghai, China



Mark Heitmann

Visiting Researcher at Columbia University New York, USA

Design cover page

www.hinderling.com

Table of Content

MANAGEMENT SUMMARY	4
MOBILE MESSAGING - INTRODUCTION	6
Worldwide relevance	6
Threatening privacy issues and mobile spam	7
Terms and definitions	8
Governmental and self-imposed regulation	9
Japan	9
USA	9
European Union	10
Australia and Singapore	10
Transnational cooperation	11
Industry imposed action	12
Research motivation	13
METHODOLOGY AND SET UP	14
Research approach and objectives	14
Global concept and local implementation	15
Scope and participation	16
Consumer participation structure	16
Corporate participation structure	17
STUDY RESULTS	19
Consumer cross-region comparisons	19
Comparative MNO / consumer analysis	26
MNO preparedness and counter measures	30
CONCLUDING REMARKS	34
APPENDIX - FULL STUDY RESULTS	34
Survey Data Central Europe (CE)	34
Survey Data South East Asia (SEA, Singapore)	36
Survey Data Asia (Shanghai)	38
Survey Data North America (NA)	40
Survey Data Business (worldwide)	42
REFERENCES	44

Table of Figures

Fig. 1: Illustrative examples for mobile spam messages	8
Fig. 2: Research approach and objectives	14
Fig. 3: Comparative analysis approach	14
Fig. 4: Worldwide coverage and research partner network	15
Fig. 5: Participation and response rates	16
Fig. 6: Consumer participants demographics: Age	17
Fig. 7: Consumer participants demographics: SMS sent per day	17
Fig. 8: Corporate participation (region and management function)	18
Fig. 9: Corporate participation (type of business and size of MNOs)	18
Fig. 10: Actual reception of mobile spam	19
Fig. 11: Origination and volume of mobile spam	20
Fig. 12: Content of mobile spam	21
Fig. 13: Emotional reaction to mobile spam (consumer vs. MNO)	22
Fig. 14: Customer reactions to unacceptable numbers of spam	23
Fig. 15: Proportion of customers who contacted MNO due to spam	24
Fig. 16: Impact of mobile spam on MNO brand	24
Fig. 17: Acceptance levels of different categories of mobile spam	25
Fig. 18: Criticality of spam today and in future (MNO perspective).	26
Fig. 19: Criticality of spam in different categories	27
Fig. 20: Measures perceived most effective against mobile spam	28
Fig. 21: Acceptance levels of different categories of mobile spam	29
Fig. 22: Reasons for threat and motivation of spammers	30
Fig. 23: Strategic assessment of mobile spam (MNOs view)	31
Fig. 24: Actual measures against mobile spam today (MNOs only)	31
Fig. 25: Rationale for not having implemented a mobile spam filter	32
Fig. 26: Satisfactions with spam filter solutions (MNOs only)	33

CONTACT

Torsten Brodt

=**mcm***institute* for Media and Communications Management
University of St. Gallen
Blumenbergplatz 9
CH-9000 St. Gallen
Switzerland

Tel. +41-71-224 2772
mobile@unisg.ch
www.mcm.unisg.ch
www.mobilespam.org