

# Mobile Content and Services (7th Edition)

Market Outlook, Revenue Opportunities & Business Models

## EXCLUSIVE: INTERACTIVE FORECASTS TOOL\*

- available as an add on to the report

\*see page 4 for more details on key features



## The most in-depth analysis of the entire Mobile, Content and Services market

**|| As the mobile content and services market evolves, different business models are emerging that have a significant impact on the relationships between different players in the value chain. The trend towards direct-to-consumer offerings is becoming more evident and players like Nokia, Apple and many others are exerting increasing pressure on mobile operators to be more innovative and collaborative with their service offerings. ||**

Shailendra Pandey, Senior Research Analyst, Informa Telecoms & Media



## HOT TOPICS COVERED IN THIS REPORT:

### Mobile Internet

- ✓ Mobile optimised Internet content
- ✓ Widgets
- ✓ Mobile browsers

### Mobile Social Networking

- ✓ Different mobile community types
- ✓ Revenue and business Models

### Mobile Advertising & Marketing

- ✓ Mobile advertising by type
- ✓ Measurement of mobile advertising

### Mobile Entertainment

- ✓ Take up of mobile digital content
- ✓ Growth of D2C channels
- ✓ Sideloaded and piracy

### Mobile Messaging & Email

- ✓ SMS, MMS, IM and email analysis
- ✓ IMS, RCS and converged messaging
- ✓ Enterprise messaging

### Location Based Services

- ✓ LBS developer strategies
- ✓ LBS pricing
- ✓ Impact of GPS enabled handsets

### Mobile Commerce, Payments & Financial Services

- ✓ Mobile payments business models
- ✓ Opportunities in matured and growth markets

EXCLUSIVE: 2008 industry survey results

SEE INSIDE FOR MORE DETAILS ON THIS REPORT



# Mobile Content and Services: Market Outlook,

## THE DEFINITIVE GUIDE TO THE MOBILE CONTENT AND SERVICE MARKET

Now in its 7th edition, Mobile Content and Services is the **most authoritative** strategic report for analysis, data and forecasts of the mobile content and services industry.

Mobile Content and Services (7th edition) addresses key questions, offers insightful case studies from around the globe and evaluates future roadmaps for players across the value chain. The **unrivalled coverage** and **in-depth analysis** provide critical information on which key industry players can base their business decisions.

## KEY QUESTIONS ANSWERED IN THIS REPORT:

- ✓ How should mobile operators and others in the value chain evolve to stay competitive and benefit from new market opportunities?
- ✓ What is their market potential in terms of end users and revenue generation?
- ✓ What are the emerging technologies and solutions to drive the mobile content and services industry?
- ✓ What role will direct-to-consumer/off-portal initiatives play in the mobile content and services market?
- ✓ What are the existing business models and what new models will emerge?
- ✓ How will mobile advertising, LBS, social networking and user-generated content influence the growth of mobile content and services?

## COVERAGE IN THIS REPORT:

- **Mobile Internet** – emerging technologies and solutions to develop for mobile web, the need for content repurposing and how mobile advertising, social networking and user-generated content will drive the mobile Internet market.
- **Mobile Social Networking** – existing business models and what new models will emerge, role of rich media in the future of mobile communities, user-generated content and revenue models for mobile social networking..
- **Mobile Advertising** – distinction between mobile advertising and mobile marketing, new business models being adopted, on-portal and off-portal advertising, impact of mobile internet, and distribution of revenue and profits.
- **Mobile Entertainment** – in-depth coverage of mobile Music, Games, TV and Video, Gambling and Adult and Personalisation content, on-portal versus off-portal adoption of services, and role of broadcasters, aggregators and mobile operators in the market.
- **Mobile Messaging** – detailed market analysis of SMS, MMS, IM, Email and how these account for P2P, A2P and P2A messaging, messaging infrastructure vendors, uptake of various messaging applications and innovative solutions for the consumers and enterprises.
- **Location Based Services (LBS)** – evaluates key industry players, LBS developer strategies, enabling technologies and positioning techniques, and market potential in terms of end users and revenue generation.
- **Mobile payments, banking and financial services** – regulatory issues surrounding operators addressing the banking sector, service deployments and trials in developed and developing markets including mobile money transfers, local and remote payments, and NFC.
- **Industry Survey 2008** – analysis and results from Informa Telecoms & Media's industry survey on the mobile content and services market carried out in 3Q08.

## KEY FORECASTS IN THIS REPORT 2008-2013

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- MMS P2P
- Email P2P
- IM P2P
- SMS A2P
- MMS A2P
- Email A2P
- IM A2P
- SMS P2A
- MMS P2A
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# Revenue Opportunities & Business Models (7th edition)

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- ✓ Global mobile voice and data revenues
- ✓ Data services adoption trends
- ✓ Mobile content and services market structure
- ✓ Mobile content and services forecasts methodology
- ✓ Global mobile content and services users by service type, region and country
- ✓ Global mobile content and services revenues by service type, region and country
- ✓ Global mobile content and services traffic by service type, region and country

### Mobile Messaging

- ✓ In-depth analysis of the market for SMS, MMS, IM and Email
- ✓ What are the factors driving increased uptake of various mobile messaging applications?
- ✓ How is the market evolving for IMS, RCS and converged messaging?
- ✓ Messaging infrastructure vendors and market developments.
- ✓ Pricing strategies for mobile messaging
- ✓ Case studies highlighting innovative mobile messaging solutions being offered

### Mobile Entertainment

- ✓ What role do broadcasters, publishers, content aggregators, handset vendors and operators play in the market?
- ✓ How are players like Nokia and Sony Ericsson expected to perform in the mobile music market?
- ✓ Why are media companies and console-games publishers stepping up their involvement in mobile games?
- ✓ How can production companies leverage their existing TV and video content on the mobile screen?

- ✓ How big is the impact of sideloading and piracy on the bottom line?
- ✓ What are the legal issues surrounding mobile adult content and gambling services?

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- ✓ Opportunities in developing and developed world
- ✓ How industry players should work to achieve standardisation?
- ✓ Service trials, deployments and case studies

### Location-based services

- ✓ Who are the key industry players in the LBS market?
- ✓ What are the crucial enablers in order for LBS to succeed?
- ✓ Which positioning techniques and LBS-enabling technologies are being used?
- ✓ What is the impact of GPS enabled handsets on the LBS market?
- ✓ What LBS are being deployed and
- ✓ What is their market potential in terms of end users and revenue generation?

### Mobile Internet

- ✓ What are the biggest obstacles to the adoption of mobile Internet?
- ✓ How will the internet on mobile devices change?
- ✓ What are the emerging technologies and solutions to drive mobile internet?

- ✓ Which types of mobile web content do users find valuable?
- ✓ How will mobile advertising, LBS, social networking and user-generated content influence the growth of mobile internet?
- ✓ How can operators embrace the open Internet without losing their existing control?

### Mobile Social Networking

- ✓ To whom is the mobile social networking phenomenon most relevant and for how long?
- ✓ What are the drivers and obstacles to mobile social networking growth?
- ✓ What are the existing business models and what new models will emerge?
- ✓ Financial benefits of launching mobile community services.
- ✓ How can operators use mobile social networking to drive data ARPU?
- ✓ Case studies of mobile social networking deployments

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- ✓ Which business models will be adopted?
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- ✓ How is the mobile Internet driving mobile advertising?
- ✓ Is on-portal advertising a sustainable business model?
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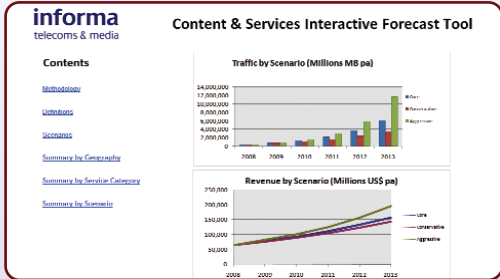
## COMPANIES COVERED IN THE REPORT INCLUDE:

- |                        |                     |                    |                        |                         |                         |
|------------------------|---------------------|--------------------|------------------------|-------------------------|-------------------------|
| • 3 UK                 | • Cell C            | • Groove Mobile    | • MySpace              | • Safaricom             | • Universal Music Group |
| • 123play.com          | • China Mobile      | • ICICI            | • NewBay Software      | • SFR                   | • Valista               |
| • 3 Italy              | • China Unicom      | • iMobile          | • Nokia                | • Silent Communications | • Verizon Wireless      |
| • 4INFO                | • Clicmobile        | • KDDI             | • NTT DoCoMo           | • SK Telecom            | • VimpelCom             |
| • AdMob                | • Digital Chocolate | • Linktone         | • O2                   | • Sky                   | • Virgin Mobile         |
| • Adobe                | • Disney            | • Llieda.net       | • Obopay               | • Sony                  | • Visa                  |
| • Amobee Media Systems | • dotMobi           | • Mastercard       | • Omnifone             | • Sony Ericsson         | • Vivo                  |
| • Apple                | • EA Mobile         | • mBlox            | • Open Mobile Alliance | • SpinVox               | • Vodacom               |
| • AT&T                 | • Ericsson          | • MCN              | • Opera                | • Sprint Nextel         | • Vodafone              |
| • Bango                | • Esendex           | • Medio            | • Orange               | • Swisscom              | • Vringo                |
| • BBC                  | • Facebook          | • Millennial Media | • Panasonic            | • Sybase 365            | • Wal-Mart              |
| • Bharti Airtel        | • Faspay            | • Mobilkom Austria | • PCCW Mobile          | • TAT                   | • Warner Music          |
| • Blyk                 | • FNB               | • Mobily           | • Playboy TV           | • Telefonica            | • Western Union         |
| • Bouygues Telecom     | • FreeBe TV         | • MobiTV           | • Qualcomm             | • Telstra               | • WIN                   |
| • BT Global Services   | • Gameloft          | • Motorola         | • Rapid Mobile         | • THQ Wireless          | • WIZZIT                |
| • Buzzcity             | • Glu Mobile        | • MTN              | • Real Networks        | • TIM                   | • Yahoo                 |
|                        | • Google            | • MTN              | • Rogers Wireless      | • T-Mobile              | • ZTE                   |
|                        | • Greystripe        | • MTV              |                        | • Turkcell              |                         |

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## EXCLUSIVE: INTERACTIVE FORECASTS TOOL – The Mobile Content and Services report companion



**Summary by Scenario**

Device Type: [Mobile] | Description of Service Category: [Video Streaming]

Geography: [Global] | Description of Sub Service: [Video Streaming]

Scenario	2008	2009	2010	2011	2012	2013	2014	2015	CAGR
Users (Millions pa)	0.80	0.80	0.80	0.80	0.80	0.80	0.80	0.80	0.0%
Revenue (Millions pa)	100.00	120.00	150.00	180.00	220.00	280.00	350.00	450.00	20.0%
Traffic (Millions MB pa)	10,000	12,000	15,000	18,000	22,000	28,000	35,000	45,000	20.0%
Average MB per user (pa)	12,500	15,000	18,750	22,500	27,500	35,000	43,750	56,250	20.0%

### Value Added Service Categories and Sub Services:

- P2P Messaging (SMS P2P, MMS P2P Email P2P and Instant Messaging P2P)
- A2P Messaging (SMS A2P, MMS A2P, Email A2P and Instant Messaging A2P)
- P2A Messaging (SMS P2A, MMS P2A, Email P2A and Instant Messaging P2A)
- Music (Ringtones, Ringback tones, Music Full-track Downloads and Music Streaming)
- Games (Games Downloads and Real time Games)
- Images
- TV (Broadcast TV and Multicast TV)
- Video (Video Streaming and Video Downloads)
- Gambling
- Internet (Mobile Internet and Portable Internet)
- Location based Services aka LBS (Personal Navigation, Point of Interest, Friend Finder, Family Tracker and Enterprise LBS)
- Mobile Social Networking
- Mobile Payments/Banking (Banking, Payments (remote), Payments (local), Mobile funds transfer Domestic and Mobile funds transfer International)

- Countries and regions covered:**
- North America**
    - USA
    - Canada
  - Latin America**
    - Brazil
  - Rest of Latin America**
    - Rest of Latin America
  - Asia-Pacific**
    - Asia-Pacific Developed
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  - Rest of Asia-Pacific**
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    - Rest of Asia-Pacific Developing
  - Western Europe**
    - France
  - China**
    - China
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    - Africa
  - Middle East**
    - Middle East
  - Global**
    - Global

In an easy-to-use interactive Excel tool you can view, compare and analyse all the forecasts, and generate more data sets and charts than those included in the report.

Get instant access to a far greater amount of information than was originally published in the written report. Dynamic tables and charts are controlled via the use of drop-down boxes to allow you to choose unique combinations of services, geographic regions and output metrics for display. Crucially, the Interactive Forecasts Tool expands upon the analysis provided in the written report by including multiple forecast scenarios, entitled Core, Conservative and Aggressive. Only the Core scenario, which Informa anticipates to be the most likely, was covered in the report.

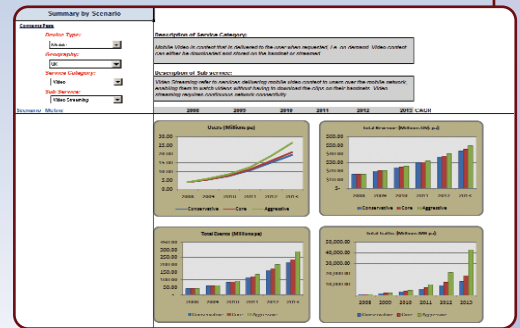
### The Interactive Forecasts Tool provides the following metrics:

- Revenues
- Traffic
- Users
- ARPU
- Average MB per user
- Events

### KEY FEATURES AT A GLANCE:

- ✓ Exclusive add-on to the Mobile Content and Services report
- ✓ Forecasts by different scenarios – Core, Conservative and Aggressive market growth
- ✓ View forecasts by: - Device Type (Mobile & Portable) - Scenario - Geography - Service Category

- ✓ A complete set of content and services forecasts in one easy to use interactive tool
- ✓ Compare and analyse different markets at the touch of a button
- ✓ Interactive charts and graphs to illustrate trends clearly
- ✓ Menu buttons and drop down lists to find what you want quickly and easily



**Summary by Geography**

Contents Page

Device Type: [Mobile]

Scenario: [Core]

Service Category: [Video]

Sub Service: [Video Streaming]

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\* contents correct at time of printing

