

## Mobile Entertainment in Western Europe (Value chain and forecasts 2006–11)

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Although the mobile content and entertainment services market accounted for less than 4% of total mobile service revenue and less than 19% of non-voice revenue in 2005, this market has the potential to grow considerably over the next five years. As mobile players seek to exploit the additional capacity offered by 3G networks, an ever-increasing array of rich-media services is being deployed, from full-track music downloads to broadcast TV bouquets. If these services are to become significant contributors to the overall mobile services market, a number of barriers must be overcome.

Mobile Entertainment in Western Europe: value chain and forecasts 2006–11 will help mobile operators, content owners, games developers, device manufacturers and middleware providers to gain crucial insights into the specific drivers of, and barriers to, the development of mobile content and entertainment services. The report will also help mobile players to understand the value of the market for mobile content and entertainment services, and how revenue from those services is likely to be distributed across the evolving value chain.

The report includes forecasts to 2011 for France, Germany, Italy, Spain, Sweden and the UK, as well as for Western Europe as a whole. Forecasts of subscribers, ARPU and revenue are split by market segment (residential prepaid, residential contract, SMEs and large corporations) and technology generation (2G, 2.5G, 3G and 3.5G). Forecasts of adoption rates, adoption levels, average spend, ARPU and revenue are provided for the following mobile service types:

- Mobile information
- Personalisation
- Games
- Music
- Video on demand
- Broadcast TV
- Gambling
- Content messaging
- Cross-media services.

In addition, forecasts are segmented by key consumer interest group (adult, sports and film) across these service categories.

Mobile Entertainment in Western Europe: value chain and forecasts 2006–11 answers your key questions:

- How big is the market for mobile content and entertainment services in Western Europe and how quickly is it likely to grow?
- What are the drivers of adoption for specific services? What are the barriers preventing this market from significantly contributing to total mobile services revenue?
- What needs to be done to eliminate the barriers, and when is it likely to happen, given current trends in the market?

- What is the forecast value of the different types of mobile content and entertainment for various countries, market segments and technology generations?
- What types of content are likely to dominate the mobile content and entertainment market?
- What trends are shaping the emerging value chain in this market? Which industry players are likely to benefit, and which are likely to lose out, because of these trends?
- How will the revenue for mobile content and entertainment services split along the value chain?

### **Who should read this report?**

#### **Mobile operators**

*Understand the main barriers and drivers that will shape the market for mobile content and entertainment services, and learn the value of the market for different types of content and entertainment service. Understand how to take advantage of trends in the value chain.*

#### **Portal and content providers and application developers**

*Discover where the opportunities lie for mobile content and gauge the size of the market. Understand the opportunities and threats presented by current trends in the value chain.*

#### **Investment banks and consultants**

*Understand how the mobile content and entertainment market is likely to affect the performance of mobile operators, content owners and other players in the value chain.*

## Contents

- What's new and executive summary
- Introduction and scope
- Current market for mobile content
- Market forecasts and analysis
- Determinants of future growth
- Value chain trends and revenue distribution
- Actions
- Methodology

## Figures and tables

**Figure 1:** *Distribution of active mobile subscribers in Western Europe by country, December 2005*

**Figure 2:** *Size and position of the mobile content market in Analysys Research's overall classification of mobile services*

**Figure 3:** *Distribution of mobile content revenue in Western Europe by service type, 2005*

**Figure 4:** *Historical ARPU for mobile voice and non-voice services in Western Europe, 2003–5*

**Figure 5:** *Mobile content ARPU in key markets, 2005*

**Figure 6:** *Historical mobile content ARPU as a proportion of total mobile ARPU in key markets, 2002–5*

**Figure 7:** *Historical mobile content ARPU of Vodafone Germany and O2 Germany, 2002–5*

**Figure 8:** *Historical mobile content ARPU of three Vodafone subsidiaries, 2002–5*

**Figure 9:** *Example of how content genres relate to content categories*

**Figure 10:** *Distribution of mobile content revenue in Western Europe by genre, 2005*

**Figure 11:** *Mobile service revenue in Western Europe by broad service category, 2005–11*

**Figure 12:** *Split of mobile service revenue in Western Europe by broad service category, 2005–11*

**Figure 13:** *Mobile content revenue in Western Europe by service type, 2005–11*

**Figure 14:** *Split of mobile content revenue in Western Europe by service type, 2005–11*

**Figures 15a–d:** *Adoption rate, average spend, cellular ARPU and revenue for free information services in Western Europe, 2005–11*

**Figures 16a–d:** *Adoption rate, average spend, cellular ARPU and revenue for paid information services and applications in Western Europe, 2005–11*

**Figures 17a–d:** Adoption rate, average spend, cellular ARPU and revenue for personalization services in Western Europe, 2005–11

**Figures 18a–d:** Adoption rate, average spend, cellular ARPU and revenue for online and downloadable games in Western Europe, 2005–11

**Figures 19a–d:** Adoption rate, average spend, cellular ARPU and revenue for VoD services in Western Europe, 2005–11

**Figures 20a–d:** Adoption rate, average spend, cellular ARPU and revenue for music services in Western Europe, 2005–11

**Figures 21a–d:** Adoption rate, average spend, cellular ARPU and revenue for content messaging services in Western Europe, 2005–11

**Figures 22a–d:** Adoption rate, average spend, cellular ARPU and revenue for cross-media services in Western Europe, 2005–11

**Figures 23a–d:** Adoption rate, average spend, cellular ARPU and revenue for gambling services in Western Europe, 2005–11

**Figure 24:** Split of gambling revenue in Western Europe by lottery, betting and casino services, 2005–11

**Figure 25:** Split of gambling transactions in Western Europe by lottery, betting and casino services, 2005–11

**Figures 26a–d:** Adoption rate, average spend, ARPU and revenue for broadcast TV services in Western Europe, 2006–11

**Figure 27:** Revenue for mobile sports, film and adult content in Western Europe, 2005–11

**Figure 28:** Factors that will determine the future growth of the mobile content market and their relative priority for operators

**Figure 29:** Proportion of revenue billed for by operators and airtime resellers in Western Europe by service type, 2005

**Figure 30:** Operator-billed and non-operator-billed revenue in Western Europe by service type, 2005

**Figure 31:** Proportion of revenue billed for by operators and airtime resellers in Western Europe by service type, 2005 and 2011

**Figure 32:** Example of methodology for forecasting ARPU

**Figure 33:** Key inputs and outputs for mobile forecast model

**Figure 34:** Key inputs and outputs for service-level components of forecast model

**Table 1:** Active mobile subscribers in Western Europe by country, December 2005

**Table 2:** Classification of the mobile content market by category and service type

**Table 3:** KPIs for free information services, 2005

**Table 4:** KPIs for paid information services, 2005

**Table 5:** KPIs for paid information applications, 2005

**Table 6:** *KPIs for personalization services, 2005*

**Table 7:** *KPIs for online games, 2005*

**Table 8:** *KPIs for downloadable games, 2005*

**Table 9:** *KPIs for VoD services, 2005*

**Table 10:** *KPIs for music services, 2005*

**Table 11:** *KPIs for content messaging services, 2005*

**Table 12:** *KPIs for cross-media services, 2005*

**Table 13:** *KPIs for gambling services, 2005*

#### **About the author**

Dr Windsor Holden (Senior Analyst) specialises in issues relating to mobile entertainment content, digital TV and emerging telecoms markets. He manages the Mobile Networks and Services module of the Analysys Research online market intelligence service and is the author of *The Western European Mobile Market: trends and forecasts 2006–11* and *Telco TV: European market opportunities and operator strategies*. Before joining Analysys in 2005, Windsor was a freelance writer/analyst, working on reports for Juniper Research, Business Monitor International (BMI) and Informa Group, and previously worked as an analyst for Kagan World Media and Espicom Business Intelligence. He is also a former Research Fellow of the Institute of Communications Studies at the University of Leeds. A regular international conference speaker, Windsor chaired C5's Mobile Multiplayer, 3D and Location-Based Games event in Barcelona and its Mobile Gambling 2005 conference in Madrid.

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