

# Mobile Commerce

## *Prospects for Payments, Ticketing, Coupons and Banking 2008-2013*

• Six key sectors analysed • Completely revised and updated • Unique global recession analysis

This strategic report provides the critical synopsis of the mobile commerce market, crucially considering the potential impact of the current and future economic downturn on each of the sub sectors up until 2013.

It considers three different scenarios; best case, median and worst case and provides global forecasts for gross transaction values for each the following sub sectors; Mobile Payments (including Digital and Physical Payments, Contactless NFC and Mobile Money Transfer), Mobile Ticketing, Mobile Coupons and Mobile Banking.

The report investigates a number of key markets forces within the downturn, such as the impact of reduced business financing for companies innovating and developing technologies within the m-commerce marketplace.

### **Key Questions Addressed by this Report:**

- What are the prospects for the mobile commerce market in the global downturn?
- Which mobile commerce market segments will be most resistant to the downturn?
- Where is the mobile commerce market headed in the future?
- What are the top growth segments of the mobile commerce market?
- What are the applications and services strategies of leading mobile commerce players?
- What will be the forecast gross transaction value of the main mobile commerce market segments in 2013?

### **Key Benefits:**

- A unique source of combined research and analysis for the mobile commerce marketplace including technologies, market characteristics and forecasts.
- Practical analysis of the emerging opportunities for vendors and operators.
- Unique insights: includes interviews of leading players with significant experience of the mobile commerce market.
- Benefit from fresh thinking and intelligent market assessment.

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# Mobile Commerce: Analysis & Forecasts

## report overview

This detailed report provides case studies from in excess of 60 mobile commerce companies with key application and services examples from each market. It presents the key recommendations for each sub sector analysed in the report.

The report considers the major drivers and constraints for the entire mobile commerce market and discusses how some sectors will be adversely affected from the downturn whilst others may be more resilient and even show some upside potential.

## analysis & forecasts

### Report Analysis

**6 Year Analytical Forecasts** provide an extensive market breakdown including transaction values and a downturn impact assessment across the entire mobile commerce market until 2013.

**Split by 8 Key Regions** North America; South America; Western Europe; Eastern Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific and Africa & Middle East.

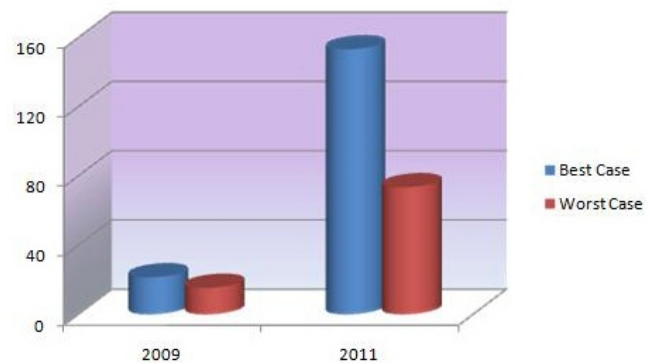
**Complete Market Breakdown** piecing together the specific market applications, services and key drivers and constraints across six major commerce sectors.

**Visual Clarity** with 26 tables and colour forecast charts.

### Market Forecast Suite 2008-2013

**Transaction Values** total transaction values for digital goods and physical goods (and expenditure comparison); mobile ticketing; NFC & FeliCa payments; mobile money transfer (national/international; total); mobile coupons (redemption value); mobile banking

### Mobile Money Transfers Market: Gross Transaction Value Forecast (\$Bn)



**Downturn Impact analysis** best case 2008 forecasts compared with a median downturn scenario and a worst case downturn scenario - by 6 sectors

## our background

Juniper Research specialises in providing high quality analytical research reports & consultancy services to the telecoms industry. We have particular expertise in mobile, wireless, broadband & IP-convergence.

Juniper is independent & provides authoritative assessments of markets, technologies & industry players. Our analysts are experienced senior managers with proven track records in each of their specialist fields.

Each report is thoroughly researched, intelligently written & proof-read by qualified experts prior to publication. The report offers a rich mix of graphics, illustrations, technology roadmaps and tables.

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## Executive Summary

### 1. Mobile Commerce Market

Report Scope & Objective; Market Segment Definitions

- Mobile payments (digital & physical goods; contactless NFC; mobile money transfer); Mobile ticketing and coupons (mobile ticketing; mobile coupons); Mobile banking

Mobile Commerce Market Trends

- Tellabs; Bango; Mobile Web

Mobile Commerce Drivers/Constraints

- Top drivers; Additional drivers; Top 3 constraints; Additional constraints

### 2. Digital and Physical Goods

Introduction; Applications and Services

- Premium rate SMS payment: N. America; W. Europe; Sybase 365
- Mobile phone bill - 'direct to bill' payment: applications and services examples; Valista
- Online - payment for the mobile web & WAP billing: applications and services examples
- SMS payment - mobile wallet & account based payment: applications and services examples

Specific Drivers and Constraints

Market Forecast

- Digital goods: total remote mobile payment gross transaction value
- Physical goods: total remote mobile payment gross transaction value
- Digital and physical goods combined: mobile payment market gross transaction value; expenditure comparison

### 3. Mobile Ticketing

Introduction; Transport Mobile Tickets

- UK (Chiltern Railways; Heathrow Express; O2 Wallet trial & Oyster card); Italy (Trenitalia); France (Air France); Germany (Lufthansa); Austria (Al Mobilkom); Poland (LOT Polish Airlines); India (Kingfisher Airlines); Japan (Mobile FeliCa)

Sport Mobile Tickets

- USA (Tickets.com); UK (Everton Football Club); India (IPL cricket)

Entertainment & Events Mobile Tickets

- India (Adlabs & PVR); USA (Fandango; RepeatSeat.com); Singapore (Singapore Air Show)

Specific Drivers and Constraints

Market Forecast

- Total mobile ticketing transaction value

### 4. Mobile Coupons

Introduction

Country Examples

- USA (Tickets.com; Fandango; IKEA); UK (Corney & Barrow; Harveys/ITV); Portugal (McDonalds); Germany (Gavitec); Japan (McDonalds; NTT DoCoMo Toruca Service); Korea (SK Telecom OK CouFun Service); Singapore (NETS); India (MoneySaver)

Specific Drivers and Constraints

Market Forecast

- Total mobile coupons redemption value

### 5. NFC & FeliCa Payments

Introduction; NFC Uses; FeliCa Uses; Applications and Services Examples

- GSM Association
- North America; South America
- Western Europe: overview; Logica; O2 UK; Italy; France
- Far East & China: NTT DoCoMo; SK Telecom
- Rest of Asia Pacific; Africa & Middle East

Specific Drivers and Constraints

Market Forecast

- Total value of NFC transactions

### 6. Mobile Money Transfer

Introduction

Regional Examples

- N. America (Trumpet Mobile; Obopay; Monitise; Everlink; PayPal and Sprint); W. Europe (Moneytext; Crandy; LUUP); Indian Sub Continent (Bharti Airtel/Western Union;

- Obopay/YES Bank; Visa); Rest of Asia Pacific (SmartMoney; Globe GCASH); Africa & Middle East (Vodafone; MTN; Celpay; MoneyBox Africa; Monitise: Made in Africa; Etisalat)

Specific Drivers and Constraints

Market Forecast

- National/international mobile money transfers: total value of national/international transactions p.a.
- National and international mobile money transfers: total value; comparison

### 7. Mobile Banking

Introduction; Applications & Services Examples

- North America (Bank of America; Wells Fargo Corporate/Retail); Western Europe (Monitise/MONILINK; Lloyds TSB Commercial; Barclays; Postbank); Eastern Europe (Garanti Bank); Far East & China (China Merchants Bank; SK Telecom; NTT DoCoMo; Mobile Money Ventures Hong Kong); Indian Sub Continent (Union Bank of India); Rest of Asia Pacific (National Australia Bank); Africa & Middle East (Standard Chartered Bank UAE)

Specific Drivers and Constraints

Market Forecast

- MBPP "Pull" service transaction value: total

### 8. Mobile Commerce: Downturn Impact Analysis

Economic Environment

- Global volatility; Guidance (impact on 2008 forecasts)

Digital Goods Purchases; Physical Goods Purchases; Mobile Ticketing; Mobile Coupons; Contactless NFC; Money Transfer; Mobile Banking

- Key market forces (impact of key market forces)
- Market (\$m) forecast comparison; Market forecast best and worst case scenarios (\$m); Comparison vs. 2008 forecast %

179 Pages

## companies included

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## author profile

Howard Wilcox is a Senior Analyst with Juniper Research, and author of the Mobile Payments Markets reports series, along with the Mobile Broadband, Fixed WiMAX and Mobile WiMAX reports. He is frequently interviewed by industry journals in both the mobile and finance sectors, and has also been video interviewed by a leading international bank and by the broadcast media including the BBC. Howard spoke at the EFMA Conference on Mobile Financial Services in November 2008 in Athens. Howard has over twenty five years' experience in the Telecommunications sector.

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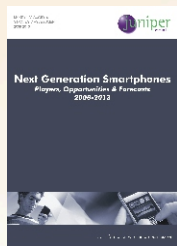
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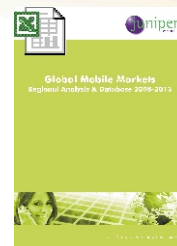
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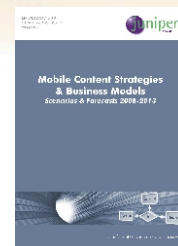
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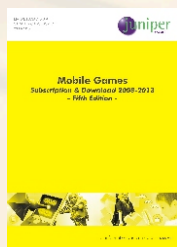
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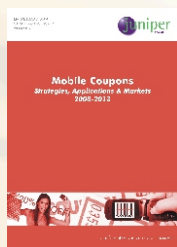
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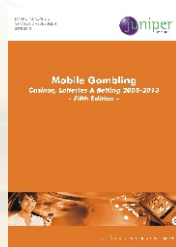
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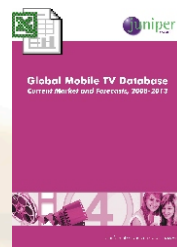
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