

Mobile Search & Discovery

Opportunities & Markets

2008-2013

This milestone study into the future opportunities for mobile search provides crucial market forecasts on mobile search and associated mobile advertising and data revenues, as well as ARPU (average revenue per user). The expansive 190 page report analyses over 15 key players in the mobile search market, and presents qualitative, detailed outlooks from key executives in the industry. The report explains the changes that are underway in the mobile search market with the emergence of off portal and on device search, for example, and explores the key drivers for the growth of mobile advertising. In addition, this forward looking mobile search study also forecasts the cost-per-click-through and the total number of searches that are ad supported. Each forecast is split by the different search strategies: general, local, on portal, off portal and (the newly emerging) on device.

Key Questions Answered by this Report:

- What is the current and future size of the mobile search market?
- What are the key drivers for mobile search adoption?
- What are the strategies of Google and Yahoo! within the mobile environment?
- Who are the major players in mobile search?
- In which regions is mobile search usage likely to be highest?
- What do key industry executives believe to be the main market opportunities?
- How much data revenue will mobile operators generate through search services?
- What are the likely implications of data storage and privacy regulations for mobile search providers?
- What are the leading location-based search platforms and applications?

Main Benefits:

- A unique source of research and analysis for the mobile search market including technologies, market characteristics and forecasts.
- Practical analysis of emerging opportunities for vendors & operators.
- Unique insights: includes interviews with leading industry players who have significant experience in the mobile search market.
- Benefit from fresh thinking and an intelligent market assessment from a respected thought leader.



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Mobile Search & Discovery: Analysis & Forecasts

report overview

The report defines five categories of mobile search: general web search, on device search, local search, on portal content search and off portal content search. It presents a regional analysis of how mobile search is developing across the globe and with a robust methodology, the report forecasts developments within these markets and their impact on the rapidly changing mobile advertising sector up until 2013. Mobile Search & Discovery explores the strategies of many of the key players within the mobile environment including Google and Yahoo!, and how ad supported revenues within mobile search will be a key enabler of the growth of mobile advertising.

analysis & forecasts

Report Analysis

Total Coverage with in-depth analytical forecasts until 2013, for eight key regions: N/S America; W/E Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific; Africa & Middle East.

Complete Evaluation of the mobile search market for strategic & market planners; focusing on detailed market sizing, forecasts, player analysis and positioning strategies.

Thorough Assessment of the opportunity for industry operators, vendors & manufacturers - researched by an industry-leading analyst in the mobile search market.

Strategic Tool for assessing & realising the unfolding opportunities in the mobile search marketplace.

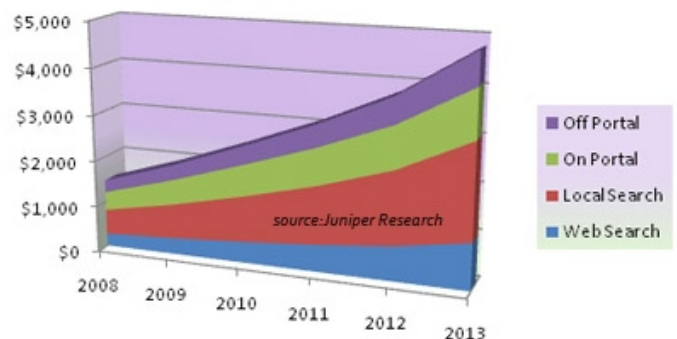
Market Forecast Suite

Global Market Subscribers (by 2G, 2.5G, 3G+ technology); Mobile searches (by type of search); Revenues (by type of search; by advertising & data charges); Advertising revenue; Data revenue (by type of search)

Regional Market Total of mobile searches; Total revenues (mobile search; advertising; data); Mobile searches; Revenue (by type of search)

Mobile On Device Search Users; No. of searches

Total Revenues from Mobile Search (\$m) 2008-2013



Mobile General Web Search Users; No. of searches; Searches with ads or sponsored links; Revenues (total; advertising; data charges)

Mobile Local Search Users; No. of searches; Searches with ads or sponsored links; Ad/link response rates; Ad spend; Revenues (total; advertising; data charges)

On Portal & Off Portal Content Search Users; No. of searches; Searches with ads or sponsored links; Ad/link response rates; Ad spend; Revenues (total; advertising; data charges)

our background

Juniper Research specialise 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 Internet

The Mobile Internet

- Environments (WAP; i-mode); dotMobi Domain
- Mobile browsers: Openwave; Danger (overview; products and services)
- Qualcomm: Overview; QIS products and services; Other enabling technologies

Searching the Internet

- Searching the Internet/mobile Internet: Web crawling; Indexing; Ranking; Presenting
- Requirements of mobile search and discovery: Handset limitations; Mobile search query entry; Mobile user behaviour; Privacy and copyright issues; Access control (SafeSearch; operational self/international regulation)

2. Global Market for Mobile Search

Definitions

- Search categories; Geographic regions; Overall forecast methodology

Factors Driving Mobile Search & Discovery

- Drivers and constraints

Global Market for Mobile Search

- Growth in the global mobile subscriber base (by technology); Growth in total number of mobile searches (by type of search)
- Growth in total mobile search revenues (by type of search; by source)
- Growth in total mobile search advertising and data revenues (by type of search);

Regional Market Breakdown

- Growth in the total number of mobile searches; Growth in total mobile search revenue/advertising revenue/data revenue

Analysis of Regional Markets

- Growth in number of mobile searches (by type of search); Growth in mobile search revenue (by type of search) for: North America; Latin America; Western Europe; Eastern Europe; Far

East & China; Indian Sub Continent; Rest of Asia Pacific; Africa & the Middle East

3. Mobile General Web Search & Mobile On Device Search

Global Market for Mobile General Web Search

- Users: Growth by region
- Searches: Growth by region
- General web searches with ads or sponsored links: Growth by region
- Advertising & data charge revenues (growth by region)
- General web search revenues: Total; Revenue split (advertising & data charges) by region

Leading Players in the Mobile Web Search Market

- Google: Overview (revenue and net income growth 2002-2007); Technology and products; Google Mobile; Google AdSense; Android
- Yahoo!: Revenue and net income growth 2002-2007; Yahoo! Mobile

Global Market for Mobile On Device Search

- Users: Growth by region
- Searches: Growth by region

Leading Players in the On Device Mobile Search Market

- Nokia: Company; Strategy, products and services

4. Mobile Local Search

Mobile Positioning Technologies

- Different positioning technologies (comparison of different technologies); Using mobile phones for location and positioning; Location middleware

Global Market for Mobile Local Search

- Local search - the leading markets
- Demand for local search from a mobile: Users (growth by region); Searches (growth by region)
- Local searches with ads or sponsored links: Growth by region
- Ad/link response rates; Ad spend
- Advertising & data charge revenues (growth by region)
- Mobile local search revenues: Total;

Revenue split (advertising & data charges) by region

Suppliers in Local Search

- Seeker Wireless; Telecommunications Systems; TruePosition; m-spatial; Mobile Commerce; mobilePeople; mxData: Overview; Products and services; Technology; Customers and partners; Future

5. Mobile Content Search and Discovery

Global Market for Mobile On Portal Content Search

- Introduction
- Demand for content search from a mobile: Total revenues from mobile entertainment (product split); Users (growth by region); Searches (growth by region)
- Content searches with ads or sponsored links: Growth by region
- Ad/link response rates; Ad spend
- Advertising & data charge revenues (growth by region)
- Content search revenues: Revenue split (advertising and data charges) by region
- Average revenue per user

Global Market for Mobile Off Portal Content Search

- Demand for off portal content search: Users (growth by region); Searches (growth by region)
- Off portal searches with ads or sponsored links: Growth by region
- Ad/link response rates; Ad spend
- Advertising & data charge revenues (growth by region)
- Off portal search revenues: Revenue split (advertising and data charges) by region

Suppliers of Mobile Content Search Solutions

- Action Engine; Celltick Technologies; JumpTap; Surf Kitchen; U-Turn; PITCH: Overview; Products and services; Technology

Appendix 1: History of the Internet

190 Pages



companies included

Action Engine • Celltick Technologies • Danger Inc • dotmobi • Google • Hutchinson 3 • JumpTap • Mobile Commerce • mobilePeople • m-spatial • mxData • Nokia • NTT DoCoMo • O² • Openwave • Opera Software • Orange • PITCH • Qualcomm • Seeker Wireless • SurfKitchen • Telecommunications Systems Inc • T-Mobile • TruePosition • U-Turn • Vodafone • W3C

author profile

Bruce has worked in the IT and telecom industries for over 20 years, providing consultancy services and information products to telecom service operators, application developers/service providers and to industry investors.

Dr Windsor Holden is Principal Analyst with Juniper Research. He is responsible for developing Juniper Research's report portfolio and designing a forthcoming range of market intelligence services focusing on the mobile content market.

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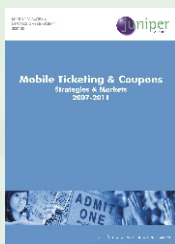
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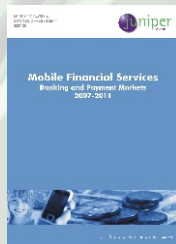
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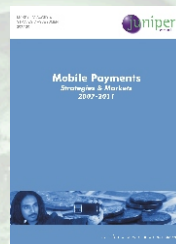
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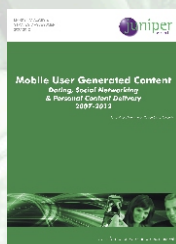
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