

Mobile Music

Videos, Streamed, Full Tracks, Ringbacks, Ringtones & Downturn Analysis 2009-2013

-Fifth Edition-

Completely revised & updated • Unique global recession analysis

This 5th edition mobile music report provides updated forecasts for each of the segments of the mobile music market; mobile music video, ringtones, ringback tones, mobile music full-track downloads and streamed music services, by 8 key regions. Vivality this report also includes an assessment of the likely impact of the global economic downturn on the mobile music market.

For each sub-sector within mobile music, the report provides datapoints for; mobile music user numbers, average and total number of mobile music services downloaded, average and total price paid for mobile music services, ARPU numbers for mobile music services, and scenario-based forecasts for mobile music advertising revenues.

As well as including profiles of the key players within the mobile music services market including major record labels, operators, aggregators, handset vendors and applications providers, this in-depth mobile music presentation includes a vital analysis of the collapse of the ringtone market and a detailed discussion of the various music delivery business models.

Key Questions Addressed by this Report:

- What are the prospects for the various business models involved in mobile music delivery?
- How will mobile music adspend be impacted by the global economic downturn?
- What are the major drivers for mobile music growth?
- What revenues will mobile full-track downloads generate over the next five years?
- To what extent is the success of ringback tones in Asia likely to be emulated elsewhere?
- Who are the major players in the global mobile music industry?

Key Benefits:

- A unique source of combined research and analysis for the mobile music 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 music market.
- Benefit from fresh thinking and intelligent market assessment.



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Mobile Music: Analysis & Forecasts

report overview

This fully updated report within Juniper's mobile entertainment series, presents a number of key drivers and constraints of the mobile music market and evaluates DRM issues, data charge reductions, demand for personal mobile music services and current and future technological advances.

Crucially, this report considers the impact the iPhone has had on the market as well as the various billing models for mobile music services and a number of strategic recommendations for network operators and vendors.

analysis & forecasts

Report Analysis

6 Year Analytical Forecasts provide an extensive market breakdown including usage, traffic and revenues across five key market sectors 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 major market opportunities for mobile music; focusing on key industry players, regulations, controls and hurdles to realising success.

Visual Clarity with 70 tables and colour forecast charts.

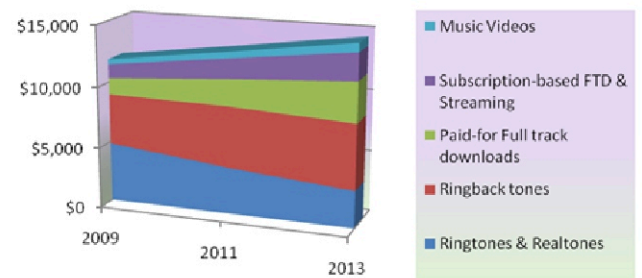
Market Forecast Suite 2008-2013

Mobile Ringtone mobile users who download ringtones; average no. of ringtone downloads/user; total; revenues; ARPU

Ringback Tone mobile users who use ringback tones; average no. of monthly subscriptions/user; total; revenues; ARPU

OTA Full Track Music Download mobile users who download; average downloads/user; total; revenues; ARPU

Total End-user Generated Revenues (\$m) from Mobile Music. By Product 2009-2013



Subscription-based Full Track Services mobile users who subscribe to services; total users split by subscriptions/streamed services, downloads & paid-for-downloads; monthly subscriptions: average per user; total; revenues; ARPU

Music Videos mobile users who subscribe to music videos; downloads: average/user; total; revenues; ARPU

Total Market end-user generated revenues: total; advertising revenues (best and worst case scenarios): total; adspend

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 Music Market Development

The Opportunity for Mobile Music

- DRM issues are being resolved; Digital is the preferred mode of purchase; Ubiquity; Proven demand for personal mobile music enjoyment; Low level of penetration of full track music services; Convergent services are increasingly desirable; Data charges are being reduced; Technological advances - networks/handsets; The iPhone has arrived; Vendors are embedding music content within the handset; Growth of the social networking is encouraging service adoption

Mobile Music Definition; Ringtones

- Realtones; Video/karaoke ringtones
- Ringback Tones; Full Track Downloads
- Historical background; Delivery of full track mobile music (streaming; downloading; sideloaded music; embedded music)

Music Video Download Service; Value Chain/Value Web of Mobile Music Services; Business Models

- Pay-per-download; Subscription/rental models
- Mobile advertising: advertising in mobile content/mobile music; advertising - a mobile SWOT analysis

Billing for Mobile Music Services

- Billing models: SMS-based; SMS MT reverse; premium rate SMS/MMS; WAP; prepaid and postpaid

2. Forecasts

Forecast Definitions and Methodology; Mobile Ringtone Market Forecasts

- Market characteristics
- Users: mobile users who download ringtones
- Traffic: average number of ringtones downloaded per user p.a.; Total downloaded p.a.
- Revenues: average price; total
- Monthly ARPU

Ringback Tone Market

- Users: mobile users who use ringback tones
- Usage levels: average number of monthly subscriptions per user p.a.; total monthly subscriptions p.a.
- Revenues: average price; total
- Monthly ARPU

OTA Full Track Music Download Market

- Users: mobile users who download full track music
- Traffic: average number of downloads per user p.a.; total downloads p.a.
- Revenues: average price; total
- Monthly ARPU

The Market for Subscription-based Full Track Services

- Users: mobile users who subscribe to full track/streamed services; total users split by subscriptions/streamed services, downloads and paid-for-downloads
- Monthly subscriptions: average number per user p.a.; total p.a.
- Revenues: average price paid; total
- Monthly ARPU

The Market for Music Videos

- Users: mobile users who subscribe to music videos; download music videos
- Downloads: average number of downloads per user p.a.; total number of downloads per year
- Revenues: average price paid; total
- Monthly ARPU

Total Market for Mobile Music

- End-user generated revenues: total
- Advertising revenues (best and worst case scenarios): total; adspend (scenario/growth rate comparison)

3. Recommendations

Recommendations for: Operators; Vendors; Aggregators; Publishers

4. Hurdles

Macro Economic Issues; The User Interface

- Difficulty in discovering services and content; Difficulty in accessing

services and content; Difficulty in navigating services and content; Difficulty in utilising multiple applications simultaneously

Handset Form, Capabilities

- Form factor; Capacity; Battery life

Network Speed and Coverage

- Opportunities provided by upgrade to 3.5G and beyond

Service Pricing

- Download prices; Subscription services

Cost of Data Services; User Confidence

- Ringtones; Full Track Download

Rights Management; Industry Structure; Localisation

5. Regulation and Controls

Regulations for Mobile Music

- Anti-piracy regulations; Copyright acts; Digital rights management

Other Regulations - Mobile Content

- Self regulation - the operator's approach; PhonepayPlus; OFCOM; CTIA; Pan-European legislation

6. Players in Mobile Music Services

Content Providers: the Major Labels

- EMI Music; Sony BMG; Universal Music Group; Warner Music Group

Selected Operators

- '3' UK; Bharti Airtel; China Mobile; KDDI; O2 (Telefonica Europe); SK Telecom; Sprint Nextel; Telenor; T-Mobile; Verizon Wireless; Vodafone

Aggregators

- Buongiorno/Blinko!; Hurray Holding; Jamba/Jamster; Myxer

Vendors

- Apple; Motorola; Nokia; Sony Ericsson

Applications Providers

- LiveWire Mobile; Musiwave; Napster; Omniphone; Oxy Systems; RealNetworks; Shazam

Billing Providers

- Bango; mBlox

157 Pages



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author profile

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.

Dr Holden has written extensively on mobile content, emerging telecoms markets and digital TV. He is also a regular conference speaker and a former Research Fellow of the Institute of Communication Studies, University of Leeds.

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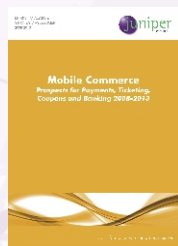
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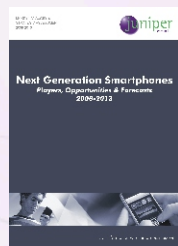
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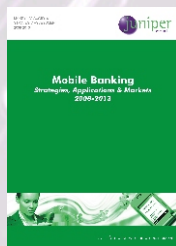
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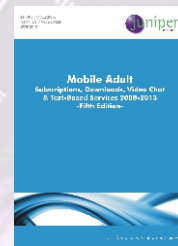
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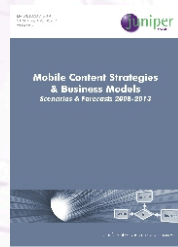
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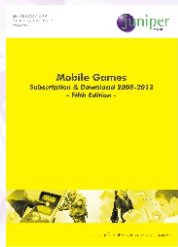
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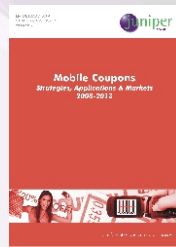
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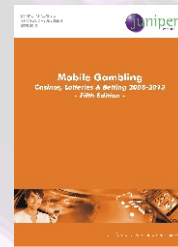
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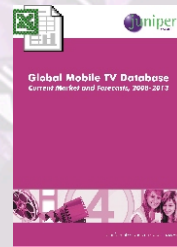
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