

# Mobile User Generated Content

## *Dating, Social Networking & Personal Content Delivery*

### **2007-2012**

Part of Mobile Entertainment Content Series (Edition 4)

This detailed report offers a complete analysis of the mobile user generated content market whilst providing vital forecast data on subscriber numbers and revenues until 2012. It segments the UGC market into three main categories including, social networking, dating/chatrooms & personal content delivery. The report also comprises interviews with key players, focused case studies and analysis from representatives of some of the leading organisations involved in this promising sector. Additionally, the report includes forecasts for revenue, ARPU and subscriber numbers for all UGC categories, together with volume of downloads from mobile personal content delivery sites, split by eight key regions together with global totals. Finally, this report includes strategic recommendations for operators, service providers, vendors and regulators.

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

- Which markets have thus far been most successful for mobile UGC services?
- Which mobile UGC services are likely to generate the highest revenues?
- What are the key hurdles to the mass adoption of mobile UGC services?
- What business models are mobile UGC players implementing, and how successful are they?
- Is advertising likely to provide a substantial revenue stream for mobile UGC services?
- What strategies should operators, service providers, vendors and regulators implement to facilitate the successful deployment and adoption of mobile UGC services?

#### **Main Benefits:**

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

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# Mobile User Generated Content: Analysis & Forecasts

## report overview

The mobile UGC report offers global and regional forecast data up until 2012, broken down by three main categories: social networking; dating/chatrooms and personal content delivery. Each category includes forecasts on the percentage of mobile subscribers that use the service as well as the total number of active users (m). The forecasting suite also provides monthly ARPU forecasts for each service along with total end-user generated revenues (\$). Additional forecasts include the proportion of mobile dating/chatroom users who pay for services, average number of PCD downloads per service user per month, total volume of PCD downloads by mobile users per year (m) and the average price (\$) paid per PCD download.

Author: Dr Windsor Holden (Principal Analyst)

## analysis & forecasts

### Report Analysis

**In-Depth Insight** for strategic & market planners focusing on the mobile UGC market - with detailed market sizing, forecasts, player analysis and positioning strategies.

**Expert Evaluation** of opportunities for industry operators, vendors & manufacturers - researched by an industry-leading analyst & author of Juniper's much heralded Mobile Entertainment series (second edition).

**Invaluable Tool** for assessing & realising the unfolding opportunities in the mobile UGC marketplace.

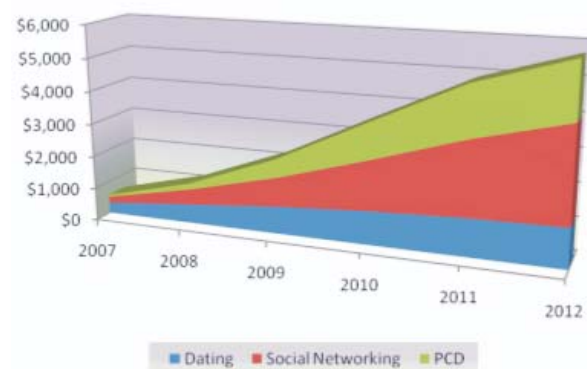
**Global Coverage** offering in-depth analytical forecasts until 2012 for regions of strategic importance including: N/S America; W/E Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific; Africa & Middle East.

### Market Forecast Suite

**Mobile PCD** Mobile subscribers who use PCD; No. of users of PCD services; PCD downloads per service user/per month; PCD downloads by mobile users/per year; ARPU; Revenues

**Mobile Social Networking** Mobile subscribers who use mobile social networking sites; No. of active users of social networking sites; ARPU; Revenues

**End-User Total Revenues (\$m) from Mobile UGC (Social Networking, Dating & Personal Content Delivery). 2007 - 2012**



**Mobile Dating** Mobile subscribers who use mobile dating/chatroom services; No. of active users of mobile dating/chatroom services; ARPU; Revenues

**Total UGC Revenues** Total revenues (\$m) from UGC; Mobile UGC revenues (ad-supported)

**Cellular Market Growth** Global subscriber growth; Subscriber base; Global 3G subscriber; Subscriber by technology (regional)

## 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. Technology

#### Introduction

#### 2G/2.5G/2.75G/3G/Beyond 3G

- Communication technologies of 2G/2.5G/2.75G; Data services: SMS & MMS (Working of; Types of services; Value chain)
- UMTS (WCDMA; EV-DO; TD-SCDMA); HSPA; 3GLTE; CDMA2000 1x EV-DO revisions A & B; UMB; Mobile WiMAX 802.16e-2005

#### Mobile Technologies Compared; Other Enabling Technologies

- Development & future of WAP; The i-mode alternative (NTT DoCoMo, i-mode subscriber growth & penetration of total user base Q2 2007); Languages, platforms & operating systems (Java; J2ME; BREW; Palm OS; Symbian; Windows Mobile); Other relevant technologies & standards (MP3; MP4; MIDI; Bluetooth)

### 2. Cellular Market Growth

#### Introduction

#### Growth of the Cellular Market

- Global subscriber growth (m); Subscriber base (market share) & penetration (%) [2005-2012]
- Leading mobile operator groups by subscriber base (m) [Q1 2007]
- Growth of 3G: Global subscriber (m) [2007-2012]

#### Regional Cellular Market Growth

- Subscriber by technology [2007-2012]: North & South America; West & East Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific; Africa & Middle East

#### The Opportunity for Mobile Entertainment

- Percentage & value (\$) of operator-billed ARPU attributable to mobile entertainment services, selected markets in 2006
- Monthly voice ARPU (\$) for UK, Germany, Italy and US [2003-2006]

#### The Opportunity for User Generated Content

### 3. The User-Generated Content Market

#### What is UGC?

- Web 1.0 vs Web 2.0, services & products

#### Personal Content Distribution

- PCD service providers: YouTube; SeeMeTV; Look at Me!; Mobango; Kyte.tv/Decentral.tv; MyCorner
- Adult amateur content

#### Social Networking

- Site providers: Cyworld; MySpace; Facebook; Bebo; MOKO; Itsmys.com; Dada Mobile; GotZapp; GoWare; Mobrio/Virgin Mobile; GREE

#### Mobile Dating Services

- Mobile dating: The Japanese experience
- Mobile dating in Western markets (the players): Handmade mobile dating (Flirtomatic); 3G Dating Agency; MeetMoi; Moviligo; Zogo; Webdate; Match.com; Gaydar; Cherrysource
- Mobile dating in emerging markets

### 4. User Generated Content - Business Models & Strategies

#### Business Models

- Pay per download; Subscription services (Bundling content); Advertising (Strengths; Weaknesses; Opportunities; Threats)

#### Operator & Service Provider Strategies for UGC Deployment

- Operator policies; Service providers: On or off-portal (Lower data charges; Improvements in the user interface; Greater variety of compelling content)

### 5. User Generated Content - Hurdles & Regulation

#### Hurdles to Customer Adoption & Retention

- The user interface: Difficulty in discovering/accessing/navigating/creating/uploading content
- Industry structure; Network speed & capacity; Service pricing; Cost of data services; Handset capacity & battery life; Privacy; Differentiation; Beyond adoption - customer retention

#### The Regulation of UGC

- Copyright: Viacom vs. Google/YouTube; MySpace vs. Photobucket
- Explicit content; Data mining

### 6. User Generated Content Market Forecasts

#### Mobile Personal Content Distribution

- Mobile phone users who use PCD services [2007-2012]: Percentage of mobile subscribers who use PCD; Number of users of PCD services (m); Average number of PCD downloads per service user/per month; Total volume of PCD downloads (m) by mobile users/p.a.
- ARPU: Average price (\$) paid per PCD download; Monthly ARPU (\$) for PCD services
- Revenues (end-user generated): Total revenues (\$m) from PCD services

#### Mobile Social Networking

- Mobile phone users who use social networking sites [2007-2012]: Percentage of mobile subscribers who use mobile social networking sites; Number of active users (m) of social networking sites
- ARPU: Monthly ARPU (\$) for mobile social networking sites
- Revenues (end-user generated): Total revenues (\$m) from mobile social networking sites

#### Mobile Dating

- Mobile phone users who use mobile dating and chat services [2007-2012]: Percentage of mobile subscribers who use mobile dating/chatroom services; Number of active users (m) of mobile dating/chatroom services
- ARPU: Proportion of mobile dating/chatroom users who pay for services; Monthly ARPU (\$) for mobile dating/chatroom services
- Revenues (end-user generated): Total revenues (\$m) from mobile dating/chatroom services

#### Total UGC Revenues

- Mobile UGC revenues (end-user generated): Total revenues (\$m) from UGC; Mobile UGC revenues (ad-supported)

### 7. Recommendations

#### Operators; Service Providers; Vendors; Regulators

122 Pages

## companies included

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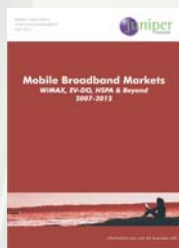
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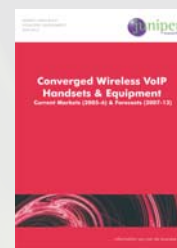
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