

Mobile Coupons

Strategies, Applications & Markets

2008-2013



Table of Contents

Glossary.....	7
---------------	---

Executive Summary

Introduction.....	9
Mobile Commerce Stream	9
Mobile Coupon Technology.....	10
Mobile Commerce Market Trends	11
Drivers & Constraints.....	12
Market Development.....	13
Market Projections	13
Recommendations	16

I. Technology and Segmentation

I.1 Introduction.....	19
I.2 Definition	19
I.3 Technology	20
I.3.1. Code (predominantly bar code).....	21
Figure I.1: One-Dimensional Barcode.....	21
Figure I.2: Two-Dimensional Barcode (PDF417).....	21
Figure I.3: Two-Dimensional Barcode	22
Figure I.4: Two-Dimensional Barcode (MaxiCode) (DataMatrix).....	22
Figure I.5: Two-Dimensional Barcode (QR Code).....	23
I.3.2. Contactless RFID - NFC.....	23
i. Technology.....	23
Figure I.6: Typical NFC Implementation	25
ii. Uses	25
Figure I.7: Oyster Card Using MIFARE Technology	25
Figure I.8: Uses of NFC	26
iii. Security	26
I.3.3 Contactless RFID - FeliCa.....	27
i. Standards & Specification	27
Figure I.9: Sony FeliCa IC Card and Reader/Writer	27
ii. Security	28
Figure I.10: Sony FeliCa Security Features.....	28
Figure I.11: FeliCa Networks Platform Management.....	28
Figure I.12: Uses of FeliCa	29

2. Market Trends, Drivers and Constraints

2.1 Introduction.....	31
2.2 Mobile Commerce Market Trends	31
2.2.1 Tellabs Interview.....	31
Figure 2.1: Tellabs Mobile Backhaul Solution	33
2.2.2 Bango Interview	33
Figure 2.2: Bango Analytics User Data Snapshot	34
2.3 Drivers & Constraints.....	34
Figure 2.3: Mobile Coupons: Summary of Market Drivers & Constraints	35
2.3.1 Drivers.....	35
i. User Demand	35
ii. Cost Savings.....	35
iii. Increase in ARPU.....	35
iv. One to One Marketing	35
v. Enhanced Security	36
vi. Increase in Customer Retention for Mobile Operators	36
vii. Environmental Benefits	36
viii. Higher Redemption Rates	36
ix. Convenience.....	36
x. Mobile Value Added Services (MVAS).....	36
2.3.2 Constraints.....	37
i. Retailer Participation	37
ii. Managing the Coupon on the Phone.....	37
iii. MMS Issues.....	37
iv. Mobile Barcode Reading Issues.....	37
v. Operators Excluded?.....	37
vi. Availability of Capable Handsets.....	38
vii. Ecosystem Incentivisation.....	38
viii. Danger of Spam	38

3. Vendor Strategies

3.1 Introduction.....	39
3.2 Vendors	39
3.2.1 Mobiqua.....	39
Figure 3.1: Mobiqua mobi-coupon	40
3.2.2 Trinity Mobile Interview	40
Figure 3.2: Trinity Mobile POS Integrated Fonescan™	41
3.2.3 Eagle Eye Solutions Interview	42
3.2.4 Gavitec Interview.....	43
i. EXIO	43
Figure 3.3: Gavitec EXIO Module	43
ii. MD-20	44
Figure 3.4: Gavitec MD-20 OEM Code Reader	44
iii. Lavasphere.....	44
Figure 3.5: Gavitec Lavasphere Software Product.....	44
3.2.5 Cellfire Interview	45
Figure 3.6: Cellfire 3.0 Mobile Coupon Process	45
Figure 3.7: Cellfire Category Filtering.....	46

Figure 3.8: Selected Cellfire Advertisers.....	46
Figure 3.9: Cellfire: Hardees Campaign Summary	47
Figure 3.10: Cellfire: Hollywood Video Campaign Summary.....	47
3.2.6 The Light Agency Interview	48
Figure 3.11: The Light Agency M BAR GO® Platform.....	48
Figure 3.12: The Light Agency WAP Voucher.....	49
3.2.7 bCODE Interview.....	50
Figure 3.13: bCode MediaPlane	50

4. Applications and Services Strategies

4.1 Introduction.....	51
4.2 USA: Tickets.com	51
Figure 4.1: Tickets.com Home Page.....	52
Figure 4.2: Mobile Tickets at Washington Nationals	53
4.3 USA: Fandango	54
Figure 4.3: Fandango For Your Mobile Phone	54
4.3 USA: Ikea	55
4.4 UK: Corney & Barrow	55
4.5 UK: Harveys/ITV	56
4.6 Portugal: McDonalds	56
4.7 Germany: H&M	57
Figure 4.4: Gavitec Mobile Coupons at an H&M Shop.....	57
4.8 Germany: Mindmatics	58
4.9 Japan: McDonalds.....	58
4.10 Japan: NTT DoCoMo Toruca Service	58
Figure 4.5: NTT DoCoMo ToruCa in use.....	59
Figure 4.6: NTT DoCoMo ToruCa in use.....	59
4.11 Korea: SK Telecom OK CouFun Service	60
4.12 Singapore: NETS.....	60
4.13 India: MoneySaver.....	60
Figure 4.6: MoneySaver SMS Mobile Coupon Service	61

5. Market Forecast

5.1 Introduction.....	63
5.2 Methodology	63
5.2.1 Geographical Splits.....	63
5.2.2 Approach and Assumptions	64
Figure 5.1: Mobile Coupons Market Forecast Methodology	64
5.3 Growth of the Cellular Market.....	65

5.3.1 Global Cellular Subscriber Market.....	65
Figure 5.2: Cellular Subscriber Growth (m) by Region, 2006-2013.....	66
Table 5.1: Cellular Subscriber Growth (m) by Region, 2006-2013	66
Figure 5.3: Cellular Subscriber Base, Market Share (%) by Region 2006-2013	67
Figure 5.4: Cellular Subscribers Penetration (%) by Region 2006-2013	67
5.3.2 Leading Mobile Operator Groups by Subscriber Base	68
Table 5.2: Leading Mobile Operator Groups by Subscriber Base (m) Q1 2008.....	68
5.3.3 Growth of 3G.....	68
Table 5.3: Global Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013.....	68
Figure 5.5: Global Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013	69
5.4 Regional Cellular Market Growth	69
5.4.1 North America.....	69
i. Mobile Phone Penetration.....	69
ii. US Market Structure	69
iii. 3G Adoption.....	70
Figure 5.6: North American Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013	70
Table 5.4: North American Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013.....	70
5.4.2 South America.....	70
i. Diverse Region.....	70
ii. Mobile Penetration Rates	71
iii. Dominant Technology.....	71
iv. Players in Region.....	71
Figure 5.7: South American Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013	71
v. 3G Deployments.....	71
Table 5.5: South American Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013.....	72
5.4.3 Western Europe	72
i. Mobile Penetration.....	72
Figure 5.8: Western Europe Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013	72
ii. Market Structure	72
iii. 3G Penetration.....	73
Table 5.6: Western Europe Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013.....	73
5.4.4 Eastern Europe.....	73
i. Mobile Penetration.....	73
Figure 5.9: Eastern Europe Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013	73
Table 5.7: Eastern Europe Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013.....	74
ii. 3G Penetration.....	74
5.4.5 Far East & China	74
i. Mobile Penetration.....	74
ii. 3G Services	74
Figure 5.10: Far East & China Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013	75
Table 5.9: Far East & China Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013.....	75
5.4.6 Indian Sub Continent	75

i. Mobile Penetration.....	75
Figure 5.11: Indian Sub Continent Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013	76
ii. 3G Services	76
Table 5.9: Indian Sub Continent Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013.....	76
5.4.7 Rest of Asia Pacific	76
i. Mobile Penetration.....	76
Figure 5.12: Rest of Asia Pacific Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013	77
ii. 3G Adoption.....	77
Table 5.10: Rest of Asia Pacific Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013.....	77
5.4.8 Africa & Middle East.....	77
i. Market Background.....	77
ii. Mobile Penetration.....	77
Figure 5.13: Africa & Middle East Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013	78
iii. Players	78
iv. ARPU.....	78
v. 3G Adoption.....	78
Table 5.11: Africa & Middle East Cellular Subscriber Forecasts (m) by Technology (2G, 2.5G, 3G, 3.5G/3.9G) 2008-2013.....	79
5.5 Coupons Market Developments	79
5.6 Mobile Coupon Users	80
Table 5.12: Mobile Phone Users (%) Who Redeem Mobile Coupons, Regional Forecast 2008-2013.....	80
Figure 5.14: Total Mobile Phone Users (m) Who Redeem Mobile Coupons, Regional Forecast 2008-2013	81
Table 5.13: Total Mobile Phone Users (m) Who Redeem Mobile Coupons, Regional Forecast 2008-2013.....	82
5.7 Mobile Coupon Traffic.....	82
Figure 5.15: Average Number of Mobile Coupons Redeemed Per Mobile Coupon User, Regional Forecast 2008-2013.....	82
Table 5.14: Average Number of Mobile Coupons Redeemed Per Mobile Coupon User, Regional Forecast 2008-2013	83
Figure 5.16: Total Number of Mobile Coupons Redeemed (m) Regional Forecast 2008-2013....	83
Table 5.15: Total Number of Mobile Coupons Redeemed (m) Regional Forecast 2008-2013.....	84
5.8 Mobile Coupon Redemption Value.....	84
Table 5.16: Average Mobile Coupon Value (\$) Regional Forecast 2008-2013.....	85
Figure 5.17: Total Mobile Coupons Redemption Value (\$m) Regional Forecast 2008-2013	85
Table 5.17: Total Mobile Coupons Redemption Value (\$m) Regional Forecast 2008-2013.....	86
6. Standards & Forums	
6.1 Introduction.....	87
6.1.1 Who is Doing What?.....	87
Table 6.1: Overview of Selected Forum Activity	87
6.2 dotMobi	88

6.3 EMVCo	89
6.4 ETSI	89
6.4.1 Members	90
6.5 European Payments Council	90
6.6 GSM Association	90
6.6.1 Pay-Buy Mobile.....	91
Figure 6.1: Pay-Buy Mobile Ecosystem.....	91
6.6.2 Members	92
6.7 GSI	92
6.7.1 Members	93
6.8 International Organisation for Standards (ISO)	93
6.8.1 Members	94
6.9 Mobey Forum	94
6.9.1 Members	94
6.10 Mobile Marketing Association	95
6.10.1 Members	95
6.11 Mobile Payment Forum	95
6.11.1 Members	96
6.12 NFC Forum	96
6.12.1 Members	97
6.13 Open Mobile Alliance (OMA)	97
6.13.1 Members	98
6.14 Smart Card Alliance	98
6.14.1 Members	98