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**Title: Review of Portals Worldwide**

**Agenda item: 10.1**

**Document for:**

Decision	
Discussion	
Information	<b>X</b>

**Report to 3GPP PCG #8**  
**New Orleans, April 25, 2002**



# **A Review of Portals Worldwide**

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# Agenda




- ▶ Quarterly Mobile Portals Surveys
- ▶ General service trends and survey key findings
- ▶ Review of Portals Worldwide

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## ▶ Quarterly Mobile Portals Surveys

# Mobile WAP portal development



- ▶ Summarises current status
- ▶ Covers operators and independent portal services providers
- ▶ Quarterly results
- ▶ Sponsored by GSA; undertaken by Satama Interactive 
  - ▶ Q1 - Q2 2001 main focus was Europe
  - ▶ Q3 included North America, Q4 included Latin America
  - ▶ Q1 survey in 2002 includes Asia Pacific region

- ▶ Quarterly Mobile Portals Surveys
- ▶ **2001 General Service Trends**

# Evaluated portals in 2001



- ▶ Q4 survey included 80 mobile portals across 25 countries.
- ▶ Primary focus on mobile operator-owned portals
- ▶ Secondary focus on independent portals
- ▶ Some portals belong to both categories - independently branded and operating portals yet fully or partly owned by an operator

# 2001 General trends



- ▶ Western Europe is a step ahead of the rest of regions surveyed (Eastern Europe, North America, Latin America)
- ▶ Marketing messages of mobile services differ from "over promising" to "hard to find information"; web-WAP synergy could be improved
- ▶ Many mobile portals seem increasingly to shift towards content aggregation; branding and synergy even more important
- ▶ Few portals differ significantly from the main stream service offering; most portals seem to focus on quantity over quality



# 2001 General trends



- ▶ Usability of especially WAP channel still needs to improve
- ▶ GPRS is available in many countries; little information is available about success of commercial deployment
- ▶ No clear model yet on how to bill for services, especially for services provided by 3rd parties, and on how to divide revenues between different players in the value web
- ▶ Pace of new services introduction, and developing existing ones, seems to have slowed down

# Key survey findings Q4: general trends



- ▶ There is a trend of stagnation, most mobile portals did not develop their content as rapidly during the latter half of 2001

Indicates either downscaled development resources or preparations for a larger roll-out of GPRS services in 2002

- ▶ Mobile portals seem to move towards more extensive content aggregation, i.e. third party content and service provision

Can affect the portal's identity and the consistency of the user experience

# Key survey findings Q4: general trends (cont'd)



- ▶ At the end of 2001 some service trends could be identified:
  - ▶ More different kinds of, and more advanced, games
  - ▶ More health-related services and concepts
  - ▶ Emergence of adult entertainment services
  - ▶ Personalisation had extended from “set up your own WAP menu” to “create your own WAP page”
  - ▶ WAP over GPRS services were promoted more

- ▶ Quarterly Mobile Portals Surveys
- ▶ Q4 General service trends
- ▶ **A Review of Portals Worldwide**

# Q1 2002 survey



- ▶ Q1 2002 survey with focus on APAC completes the global view on mobile portals; Europe, North and South America, and APAC
- ▶ Q1 2002 survey includes 12 mobile portals from six APAC countries; Australia, Hong Kong, Japan, The Philippines, Singapore, South Korea
- ▶ Q1 2002 published February 20, 2002;
- ▶ Download from [www.gsacom.com](http://www.gsacom.com)

# Asia Pacific mobile markets



- ▶ Mobile penetration rate is well over 50% in most of the studied APAC countries
- ▶ Mobile usage, especially for data services, has substantial growth capacity in the region - mobile data is expected to fill the gap in decreasing voice service ARPUs
- ▶ Japan and South Korea are frontrunners in the mobile evolution
- ▶ APAC operators have been first to introduce commercial 3G networks

# Asia Pacific mobile portals



- ▶ APAC mobile portals mostly have a vast offering of services; some portals boost access to thousands of sites.
- ▶ Third party content provisioning is common
- ▶ Colour screens, good graphical capabilities and functionally advanced handsets enhance quality and richness of services
- ▶ Some operators have a separate mobile portal for PDA users

# Asia Pacific mobile portals services



- ▶ Most portals offer:
  - information services e.g. general, financial and sports news, weather updates, traffic information and directories
  - communication & community services e.g. e-mail and messaging
  - entertainment e.g. TV & movie info, restaurant info and games
  - m-banking e.g. account balance, transactions and purchases
  
- ▶ Less usually offered, but still common services include:
  - ▶ direction assistance, flight and hotel information
  - ▶ PIM tools
  - ▶ commuting information (timetables)
  - ▶ stock trading and auctions



# Asia Pacific handsets and technologies



- ▶ Mobile operators have influenced handset development towards advanced functionalities, e.g. multimedia, picture-phones
- ▶ Operators stress the importance of Java applications and multimedia in generating data revenues in the coming years
- ▶ Packet-based networks with increased data rates have been widely introduced
- ▶ Third generation mobile licenses have been awarded or the licensing process is underway in most countries. Acceptance and speed of development is affected by take-up of 2.5G services

# Review of mobile portals worldwide

## - Conclusions (1)



- ▶ Compared with Europe and the Americas, mobile Internet has been more successful in APAC, with Japan and Korea leading the evolution
- ▶ APAC region is leading the pack in most mobile portal service categories, but differences are mostly not significant
- ▶ Most mobile portals do not seem to have any specific target group, and the same services are most common in all regions

# Review of mobile portals worldwide

## - Conclusions (2)



- ▶ Services offered by most mobile portals in every region:
  - information services, such as general and financial news, sport news and results and weather updates.
  - leisure related services such as restaurant listings and different kinds of entertainment.
- ▶ Services that are still not common in most regions:
  - auctions, stock trading and location-based services
- ▶ APAC region stands out as offering more m-banking and purchasing services

# Study areas for 2002

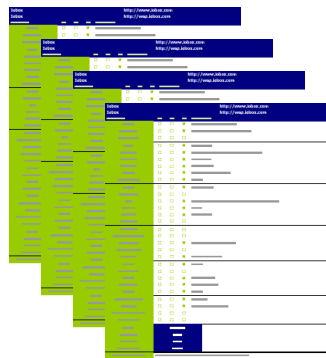


- ▶ Maintain global review
- ▶ Provide regular updating and reporting
- ▶ Keep focus on end-users; especially service provisioning, branding
- ▶ Research and clarify portal operators' approach to:
  - ▶ target segmentation
  - ▶ value proposition
  - ▶ branding strategy
  - ▶ revenue model and billing scheme
  - ▶ current and evolving GPRS/3G services

# Download and feedback



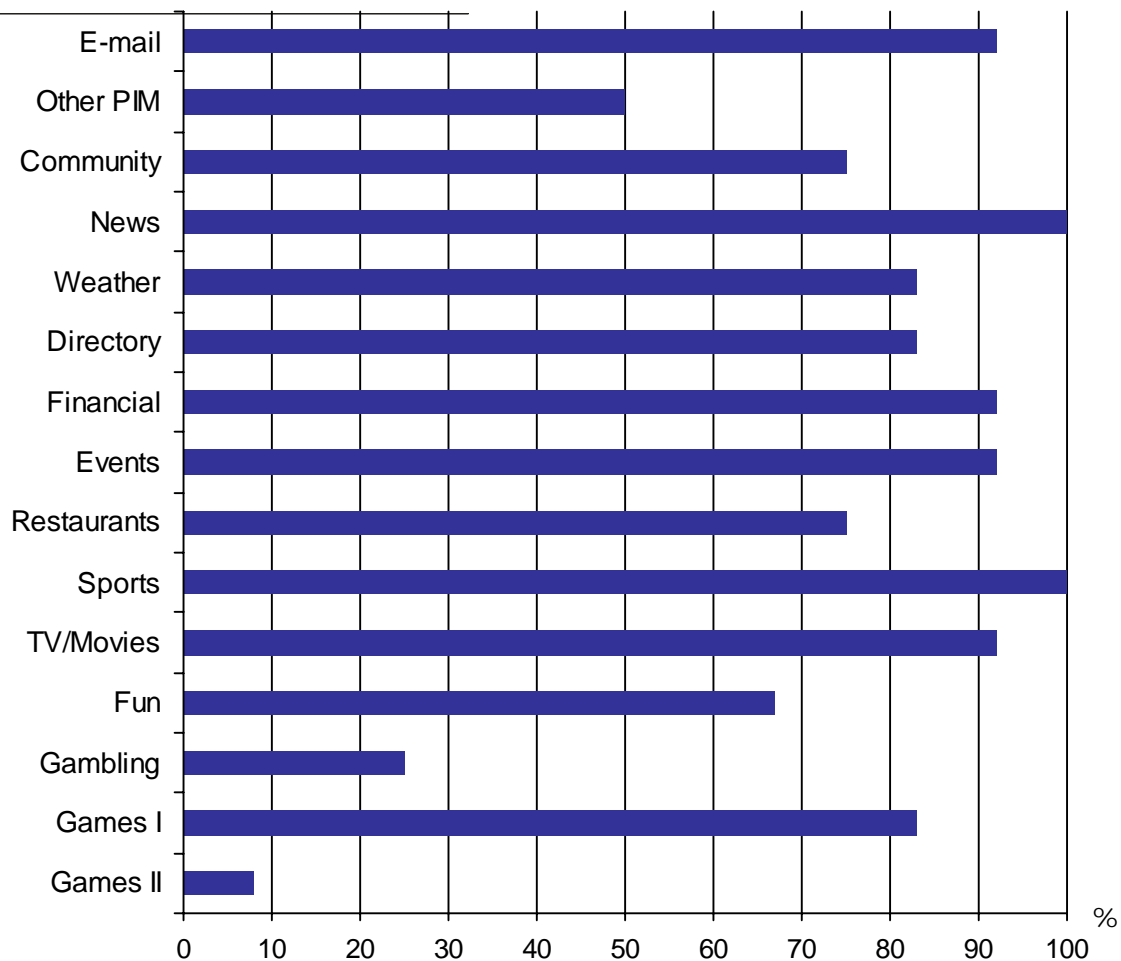
- ▶ Download the survey at [www.gsacom.com](http://www.gsacom.com)
- ▶ Tell us what you think [surveyfeedback@gsacom.com](mailto:surveyfeedback@gsacom.com)



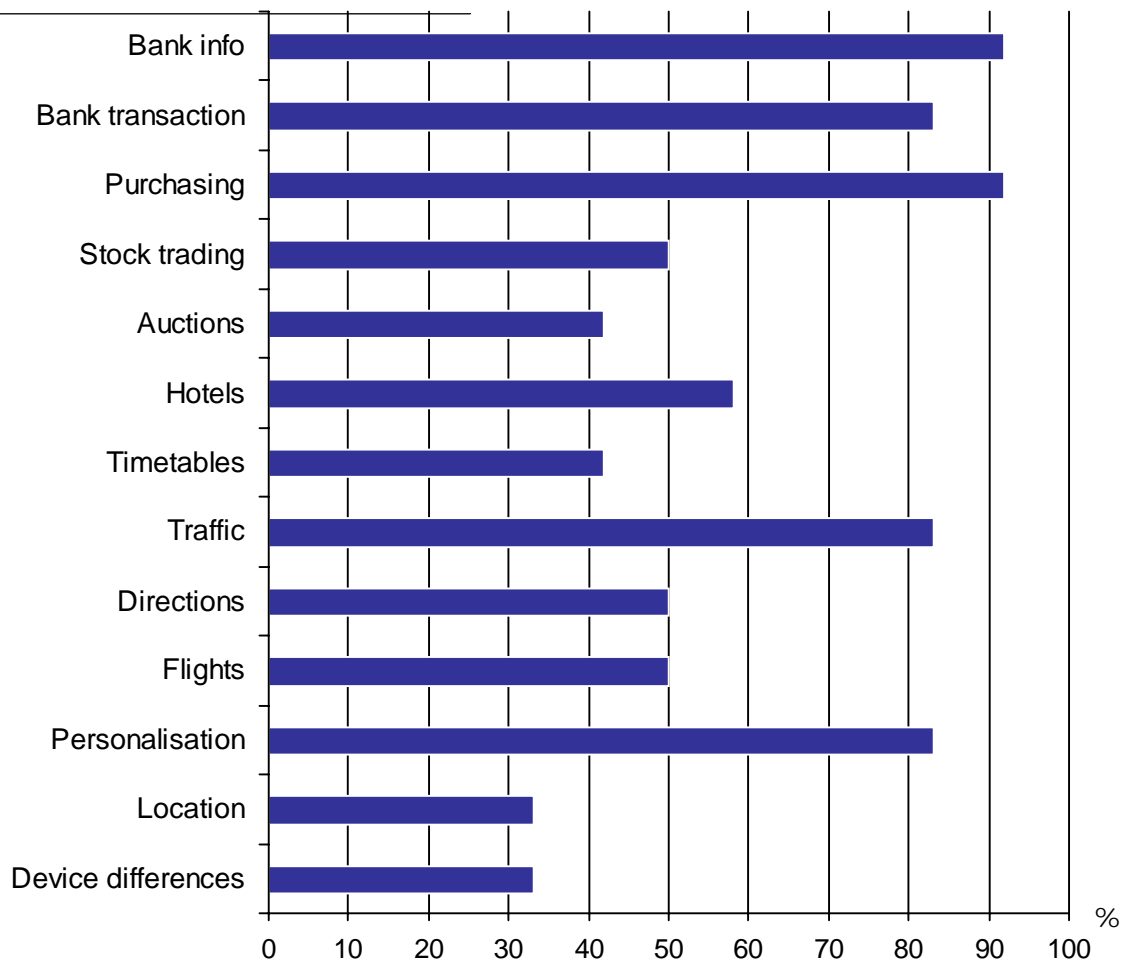
## Appendix

- ▶ Comparison of services: APAC
- ▶ Regional comparisons

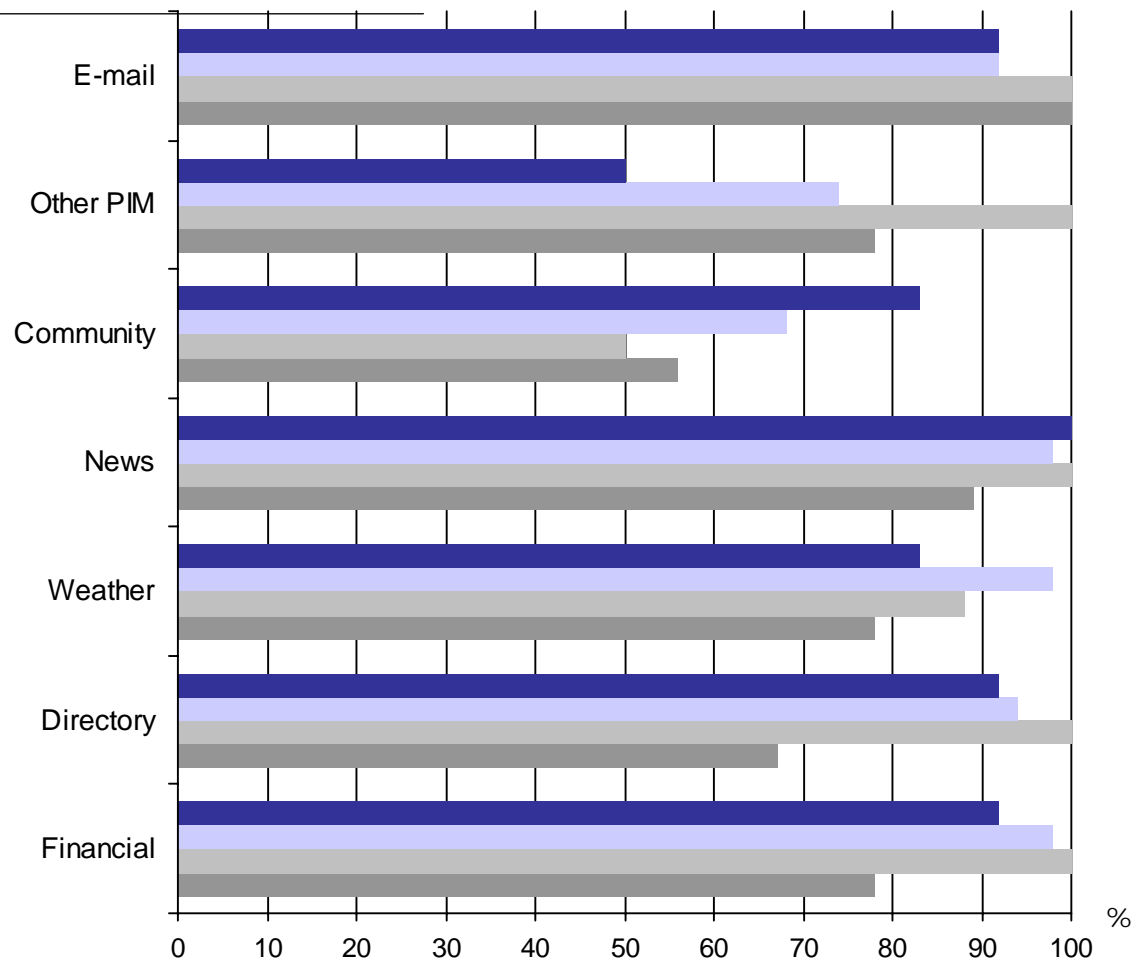
# Communication, Community, Information & Lifestyle services in APAC



# Travel, Transaction and "Other" services in APAC



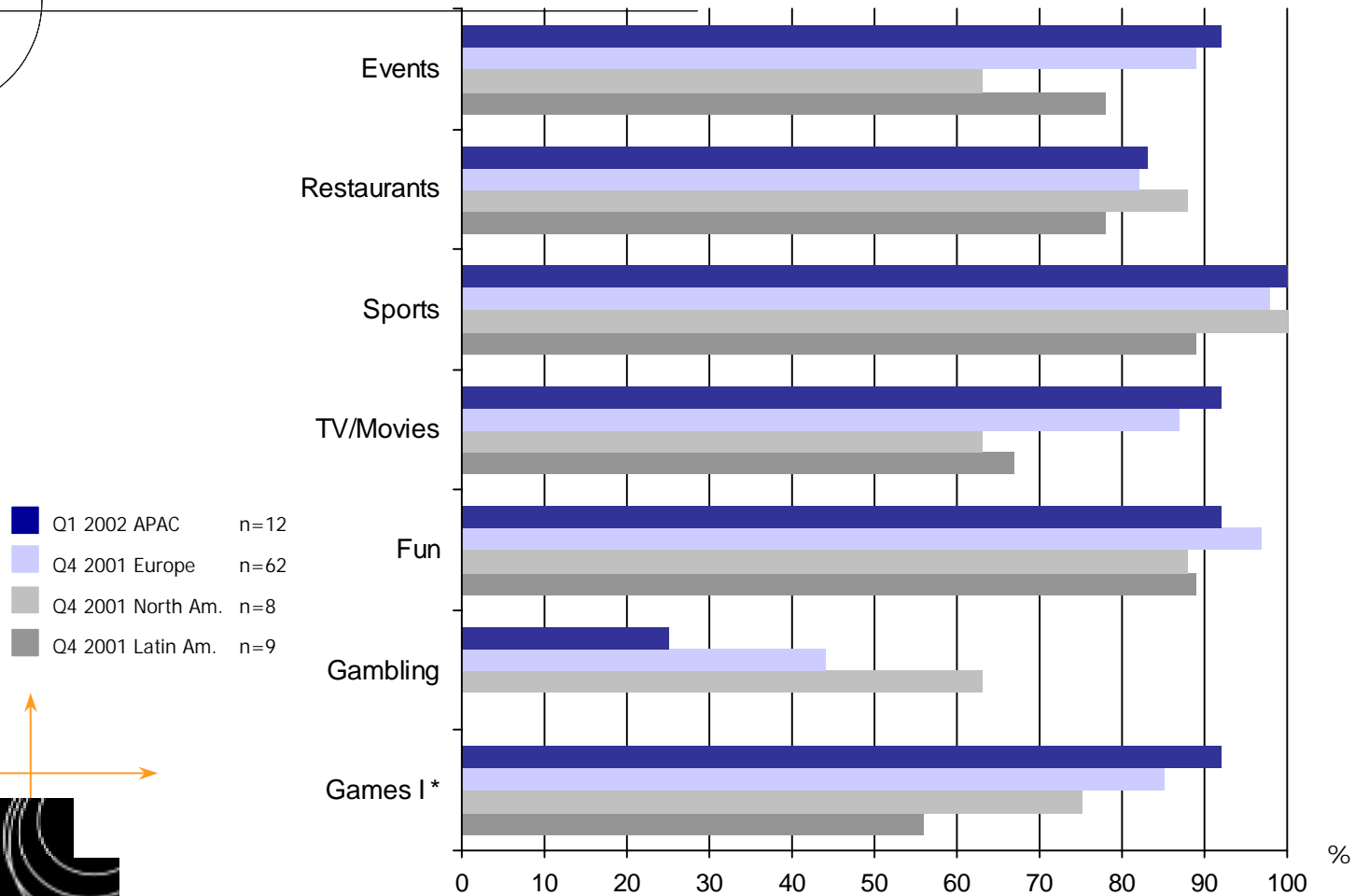
# Comparison of Communication, Community and Information services worldwide



■ Q1 2002 APAC n=12  
■ Q4 2001 Europe n=62  
■ Q4 2001 North Am. n=8  
■ Q4 2001 Latin Am. n=9

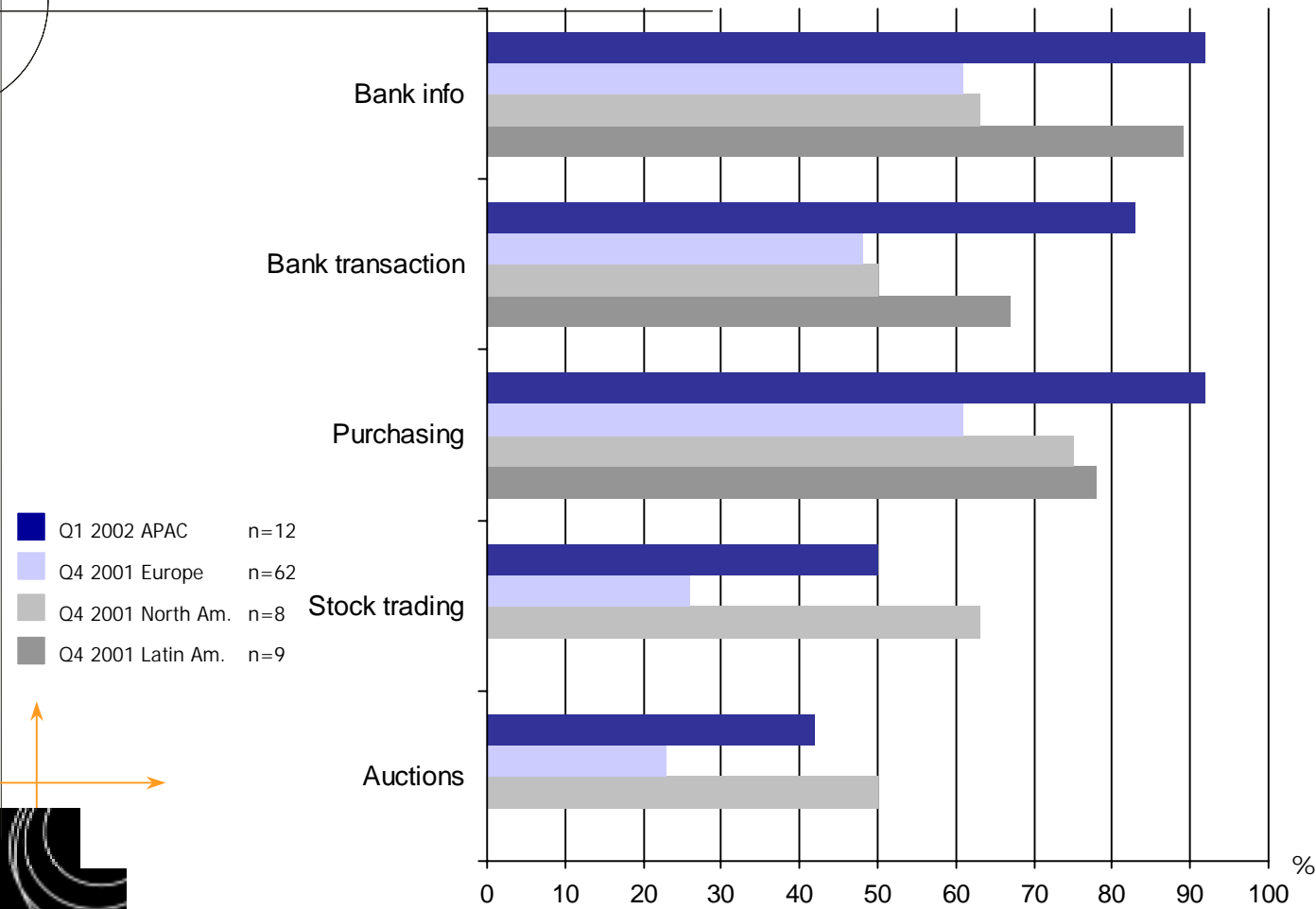


# Comparison of Lifestyle services worldwide



\* Multiplayer games not included

# Comparison of Transaction services worldwide



# Comparison of Travel and "Other" services worldwide

