Mobile Location-Based Services

Mobile Location-Based Services covers the latest developments on the European LBS market.

This report in the LBS Research Series from Berg Insight provides you with 140 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

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- **Location technologies** such as GPS, A-GPS, Cell-ID and hybrid network based solutions.
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- **Local search and information** applications developed by established Internet industry leaders and new start-ups.
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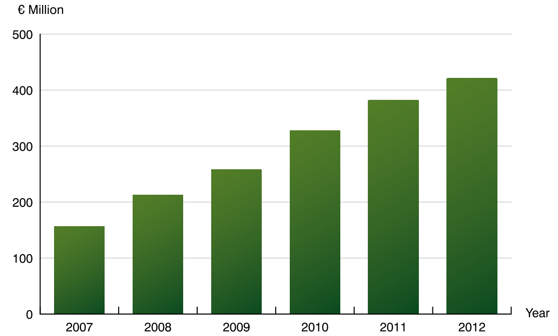
What is the current status of the European mobile LBS market?

Even though many mobile location-based services (LBS) have not become as successful as anticipated a few years ago, some location services already show much promise in several European countries. The most successful services, in terms of revenues, are turn-by-turn navigation services, corporate fleet management and tracking solutions, in addition to location-based voice and data tariffs. In 2007, about seven years since the launch of the first services, European mobile LBS revenues amounted to roughly € 157 million.

Several important drivers are finally about to bring a breakthrough for LBS in Europe. With mobile penetration reaching saturation, intensified competition and regulations driving call prices down, mobile network operators increasingly seek new ways of maintaining revenue growth. Increased focus on delivering value added services, including various location-based services, is one means of achieving this. The performance of new handsets is gradually improving, with a growing share of handsets featuring larger displays with higher resolution. Moreover, because of improving coverage of high speed 3G networks, increased availability of reasonably priced flat rate data plans, as well as better browsers in handsets, usage of mobile internet services are increasing at a fast rate in Europe.

Meanwhile, new possibilities to access suitable location data is emerging for service providers. EU E112 regulations mandating location of emergency callers have prompted operators to install positioning technology in their networks. To leverage the investments, more and more operators open their platforms to third party developers and location aggregators to enable deployment of commercial services. Some service providers, such as Google, even compile their own databases of cell tower locations that can be used as free alternatives, albeit with lower initial availability in some regions. 2008 is well set to become the breakthrough year for GPS-enabled handsets in Europe as more manufacturers are finally launching a growing number of models. These new handsets feature user plane assisted GPS, enabling deployment of assistance services with lower network impact and lower cost compared to control plane implementations in the past.



LBS revenue forecast, € million (Europe 2007–2012)

Greater availability of GPS handsets has proven especially important for turn-by-turn navigation services that require high accuracy location data, but are less sensitive to availability of position data indoors. In contrast to early adopters, mass-market users have not been willing to use external GPS receivers. Current navigation services are centred on in-car navigation, but most service providers are introducing new features to drive usage and add value in every-day situations, for instance pedestrian and multimodal navigation, local search, social networking and location sharing.

Many new services being launched, including location-enhanced social networking, search and information services, in addition to turn-by-turn navigation services, are intended to be funded primarily through advertisements. The number of users is still low but grows fast. At the moment, most ads are in the form of banners and interstitials that are not served based on the users' location. However, many actors in the value chain show great interest in providing targeted ads based on user's current location. Nevertheless, several issues, such as user privacy, pricing of location data, along with scalability of the location technology need to be resolved before location-based advertisement campaigns can leave the trial stage and contribute significantly to the LBS industry revenues.

Berg Insight forecasts European LBS revenues to grow to about € 421 million in 2012. Including location-based tariffs for data and voice calls, total revenues can well exceed €1,816 million. Although location-based tariffs may not be introduced in all European countries due to specific market characteristics, there is still considerable potential in markets were fixed to mobile substitution has not progressed far yet.

This report answers the following questions:

- What is the current status of the European mobile LBS market?
- How is GPS-technology altering the conditions for providers of location-based services?
- Can the success from the navigation device market be transferred to the mobile environment?
- What are the plans of Google, Microsoft and Yahoo! in the area of local search?
- How can location technology enable and enhance mobile social networking?
- What types of tracking services are available on the European market?
- Why are mobile operators such as Telefónica O2, T-Mobile and Vodafone introducing location-based billing?

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About the Author

André Malm is a telecom analyst with a Masters degree from Chalmers University of Technology. He joined Berg Insight in 2006 and his areas of expertise include location based services, wireless M2M and personal navigation services.

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