



the Multimedia Research Consultancy

# Mobile Games: Specialisms, Routes to Market, App Stores and Social Networking – The Winners and Losers: 2009 - 2011



## The Mobile Games Industry Experts Panel Report No. 2 – June 10<sup>th</sup> 2009

The Multimedia Research Consultancy

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## Overview

This is the second in an ongoing series of reports on the global Mobile Games industry. Each study is based on online B2B research amongst a panel of senior decision makers/opinion formers from across the industry. This **Mobile Games Industry Experts Panel** was recruited by *the Multimedia-Research Consultancy (TMRC)* to provide high quality, informed opinions on the mobile games industry. The overall aim is to generate regular, quantifiable and economically priced B2B (Business to Business) research on the wide range of issues confronting the industry. This report contains an Executive Summary, full results from the research and a detailed technical background to both the report and survey.

## What is the Mobile Games Industry Experts Panel?

The panel comprises senior managers from the world's Mobile Games industry and embraces Developers, Aggregators, Distributors, Publishers, MNO, MVNO and D2C Portal Operators, Mobile Phone Manufacturers, Mobile Games Platform Providers, Porting, Localisation and Testing specialists, Middleware Developers and Media.

## Why have an Experts Panel?

The Mobile Games (Content) industry faces many complex issues, driven, in part, by the range of competing development platforms, operating systems, distribution patterns and business models. This has produced an industry far from certain about its future direction and the strategies it should adopt to ensure commercial success.

TMRC has frequently observed, and listened to, small specialist panels at conferences and trade shows. These generate invaluable amounts of anecdotal feedback on the industry's key issues and are widely reported in the online and offline trade press and by industry bloggers.

However, they cannot provide these valuable sentiments with the **solidity** that comes from gathering opinions from **larger** numbers of industry professionals.

Our goal is to use online research to tap knowledge from our growing panel of industry experts. This, in turn, will enable us to provide both panel members and non-panel members with substantive information to help them evaluate key industry trends and contribute to their short term tactical and long term strategic planning.

## Market Led Lines of Enquiry

Prior to initiating this research programme we asked our panel what key issues they felt were confronting today's global mobile games industry. By May 2009 **more than 275 lines of enquiry** had been generated by panel members. The range of issues, and the ease with which they were raised, only served to confirm our initial assessment of the industry (see above).

For more details see [http://www.multimedia-research.com/Experts\\_panel\\_issues.html](http://www.multimedia-research.com/Experts_panel_issues.html), as well as Pages 40 - 41.

Each of our online surveys focuses on different issues. This first survey (March 2009) addressed **The Impact of the global Credit Crunch** on the mobile games industry, as well as evaluating **Current and Future Prospects for Development Platforms and Operating Systems**.

The second survey, upon which this report is based, focuses on **Mobile Games Specialisms, Killer Apps, Routes to Market, Apps Stores** and **The Importance of Social Networking** in the mobile games space.

### Who is on the Mobile Games Industry Experts Panel?

As at May 23rd 2009 the panel had 178 members from 40 countries, including senior representatives from many of the industry's big hitters, such as Aspiro, Arvato Mobile, CipSoft, Concrete Software, EA Mobile, End 2 End Mobile, Fishlabs, Gameloft, Glu, Handmark, Handy-Games, Ideaworks3D, Jamba, Nokia, Player X (Zed), Pulse Interactive, Real Networks, Redlynx, Selatra, Sony Ericsson, Vodafone ... and many more.

The composition and quality of the panel means that it should deliver considered and informed opinion – with 87% of members being CEOs, COOs, CTOs, CMOs, Presidents, MDs, Directors, VPs, EVPs, SVPs, Studio Heads and General Managers.

### Why become a Panel Member?

Anyone who is interested in reducing uncertainty in their decision making should consider joining the panel. In return panel members will be amply rewarded for their time and input, as well as for their willingness to remain with the panel. To this end we have developed a range of attractive incentives. They are as follows:

- (i) As an incentive to remain on the panel, members are being offered the full results from individual surveys at **heavily discounted prices (60% below the price to non-Panel Members)**, as long as they complete them in full. So, for example, this report will normally retail to non-Panel Members at \$750 – however, **Panel Members will only pay \$300**, which we believe represents excellent value for money. **Moreover, there is no obligation to buy the results from any survey.** **So the risk to a Panel Member, other than devoting up 5-10 minutes of his or her time every three months or so, is ZERO.**
- (ii) In addition members are given the opportunity to regularly submit questions or topics which could be incorporated in future surveys, ensuring that any research is both market led and timely in nature and, therefore, relevant to the industry at large.
- (iii) Finally, those members who remain on the panel for a year or more will be entitled to a preferential 50% discount should they wish to rent *TMRC's Mobile Games Enterprises Database* (either in its entirety or just selected extracts).