

The future of prepaid wireless

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Ovum

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Introduction

Wireless operators around the globe are taking a keen interest in expanding prepaid services to accommodate a growing number of customer demands. Ovum interviewed 19 operators in three regions to understand their evolving strategies towards prepaid wireless services.

Features and benefits

- Understand how operators strategy towards prepaid is evolving
- Learn how and to what effect operators are using more sophisticated customer segmentation to optimize a broader range of prepaid services and devices
- Gain insight into operators' timing and plans for upgrading OSS/BSS systems to more rapidly respond to new prepaid charging needs

Highlights

14 of 19 operators interviewed are looking to expand postpaid services to prepaid customers, or have begun doing so. Another eight of 17 operators said moving prepaid customers to postpaid behavior was driving the need for hybrid service models. Eight of 17 of the operators we interviewed are currently offering high-demand consumer devices to their prepaid customers. A third of operators said time to market was one of the biggest technical challenges they face in implementing prepaid service strategies within their OSS/BSS system. Eight out of fourteen operators said they are already in the process of implementing OSS/BSS changes to accommodate new prepaid service capabilities and features.

Your key questions answered

- How are the characteristics of prepaid mobile services changing and what are the differences among regions and individual operators?
- How are hybrid services being used by operators to fulfill new prepaid service objectives and needs?
- What types of segmentation and loyalty strategies are being employed by operators to serve their prepaid customer base?
- What types of OSS/BSS challenges do mobile operators face in executing new prepaid strategies and objectives?

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Ovum view

Key messages

Recommendations for operators

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HISTORY OF PREPAID WIRELESS AROUND THE GLOBE

Most wireless customers worldwide are prepaid customers
Operators are moving away from prepaid-to-postpaid migration strategies

NEW CUSTOMER DEMANDS ARE DRIVING OPERATORS TO EXPAND PREPAID SERVICES AND FEATURES

Prepaid approaches and motivations vary by region and by operator
Customers want more from prepaid wireless

OPERATORS TAKE A HYBRID APPROACH TO PREPAID

Hybrid plans come in many forms
Customer choice, cost control, and loyalty are driving the shift towards hybrid service models
Operators move up-market with bundled prepaid services, and down-market with session-based plans
Hybrid plans deployed in 2010

PREPAID SEGMENTATION AND LOYALTY GETS STRATEGIC

Operators employ more sophisticated customer segmentation strategies
Operators segment prepaid customers by usage type, age, and revenue
Loyalty is a critical component of successful prepaid strategies
Operators in North America and Asia-Pacific take a different approach to encouraging loyalty

PREPAID PRESENTS UNIQUE SERVICE DELIVERY CHALLENGES

Prepaid services present charging system challenges
Implementing new prepaid strategies means upgrading current OSS/BSS systems for many operators
Migration, integration, speed to market, and flexibility top operators' list of challenges for current OSS/BSS implementations

APPENDIX

Methodology
Further reading
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