

Global Mobile Data Monetization and Pricing Strategies by Telcos - Analysis and Key Trends

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Abstracts

Mobile data is the buzzword across all the leading telcos globally, and is a key focus area for the telcos. The telcos in the developed regions are focussing on further monetization of their services offerings for the existing customers through a portfolio of innovative services like Video On Demand (VoD), music streaming, video streaming etc, whereas the telcos across the emerging regions are emphasizing on increasing the mobile broadband penetration rate through low cost entry level packages for the first time users, services bundling and array of VAS services like mobile gaming, apps downloads, video clip download etc. Increased monetization of their data services would enable the telcos to negate the decline in overall revenue margins as the voice revenues is already under pressure owing to hyper-competition for the voice services pricing.

Mobile data services demand is expected to grow further globally driven by increased penetration in the emerging countries of Asia and Africa, where the mobile penetration is relatively low as compared to the global average. The telcos owing to the exponential increase in the demand have increased Capex and Opex requirements, and hence have to increase the monetization of their services offerings to increase the realization rate of the investments being made in infrastructure improvement and for availability of better services. In the developed countries, the deployment of advanced networks like 4G/LTE would further support applications with high bandwidth requirements. Globally, the growth of mobile internet services would be driven by the factors such as availability of affordable smartphones with improved technical features and functionalities, increased availability of advanced networks like 3G & 4G/LTE being deployed by telcos globally, increased usage of mobile application versions and competitive pricing of data services to target diverse set of customers.

This research report provides an insight on mobile subscriptions and mobile broadband growth trend across various regions. It also includes a brief overview about the factors which are driving the increased adoption of broadband services. Various pricing plans being adopted by the telcos to drive the data monetization have also been discussed alongwith select examples and its positive impact on the telcos operational KPIs. The reports also includes finding of the survey conducted by WiseStrokes across select countries like Brazil, India, China, Philippines, Malaysia, Vietnam etc to know about the users trends. The report is generated through secondary findings available on the internet and the relevant sources of data have been mentioned wherever applicable.

Key Findings

The global mobile cellular subscription count was expected to be 6.9 billion by the end of 2014, with developing countries mostly in the Asia and Africa region expected to contribute ~78% of the total subscriber base.

Telcos continue to focus on in the emerging markets owing to the relatively low mobile penetration rates, as increasing number of telcos continue to launch their services in these region to compensate for the revenue growth rate decline in the developed regions- which has been complimented with aggressive pricing plans and also the availability of relatively affordable smartphones in these regions in the past 2-3 years.

Asia-Pacific region will continue be the destination of the highest number of mobile phone shipments over 2012-18, with the total mobile phone shipments increasing from 0.3 billion in 2012 to reach ~1.0 billion by 2018.

Free apps downloads which is estimated be to 91% of the total downloads in 2013 is expected to increase to 94.5% of the total downloads in 2017.

The total number of smartphone users accessing OTT services is expected to reach more than 2 billion by the year 2017.

Target Audience

Mobile Network Operators

Mobile Software Developers

Handset and Tablet Manufacturers

Content and Applications Aggregators

Wireless Privacy and Security Specialists

Mobile Marketing and Advertising Providers

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