

Global Mobile Data Pricing Report

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Abstracts

Overview

The mobile services sector is witnessing strong growth in developing countries has been driven by increased competition and affordable services and devices. Mobile-cellular telephony continues to replace fixed-line services, the latter still being dominated by the incumbent operator in many developing countries. The voice revenues margins for most of the operators in under margin pressure, is witnessing innovations and rationalizations of the pricing plans by almost all the operators in various aspects of its functioning like increased/reduced benefits associated, validity period, Hybrid plans, Common bills for a select group of members (like family) and bundled offerings. More and more number of countries are focusing on investments in terms of ICT availability, access and use, which further propels the awareness, diffusion about the processes and usability, and in turn further boosts the demand from the consumer side, driven by the spread of mobile internet (or Mobile Broadband Services).

Key Findings

The data services offerings offered by various service providers across all the major regions, do have a wide variance in their respective offerings (benefits) for the customers, except for some operators who either plan to pursue disruptive pricing or they drive the market pricing dynamics based on their pricing.

The cost of the offerings were relatively less priced in developing regions like Asia-Pacific and the African regions, where the subscriber additions is still witnessing growth and indirectly adding to the data user base. The Cost/GB, Annual Cost of the Package (Data plans) and the Affordability Index (of the particular data pack) was observed to be on the higher side in most of the offerings by the service providers.

By end 2011, the number of fixed (wired)-broadband subscriptions had reached to almost 600 million, which corresponds to global penetration rate of 8.5%. The number of active mobile broadband subscriptions grew by around 40% (i.e. between 2010 and 2011) to reach around 1.1 billion by end 2011.

The number of MBB subscribers is almost twice the number as compared to fixed-broadband subscriptions. European region is the leading region in the broadband uptake, with highest number of fixed as well as mobile broadband subscriptions per 100 inhabitants.

Broadband prices in emerging markets have dropped steeply over the past year, but the services continue to be out of reach for the average consumer, so affordability remains a key inhibitor to uptake.

The operators continue to lower prices; this trend will continue as they seek to add more subscribers and begin to offer additional value to existing customers.

Contents

1. EXECUTIVE SUMMARY

2. MOBILE PRICING- INTRODUCTION AND OVERVIEW

3. SERVICE CATEGORY OFFERINGS IN VOICE AND DATA SERVICES

3.1 Voice Pre-paid plans

3.2 Post-paid Services

3.3 Hybrid Services Plan

3.4 Unlimited Plans

3.5 Mobile Data plans- Prepaid and Post-paid

3.6 Bundled Plans

4. DATA SERVICES AS REVENUE BOOSTERS

4.1 Drivers of Data services

4.1.1. User Experience

4.1.2. Segmentation of the customers

4.1.3. High speed data access services

4.1.4. Subsidy on select devices

4.1.5. Affordable and attractive Pricing

4.2 How can the operators increase the monetization of mobile data service

4.2.1. Application and Content Specific Charging

4.2.2. Content based/specific charging and pricing

4.2.3. Loyalty and Promotions

4.2.4. Convergence and Service Bundling

4.2.5. Partner Subsidies (Content and Advertising)

4.2.6. Pricing Simulation

4.2.7. Service Passes – Encouraging Low Risk Product Adoption and Attracting Casual Users

4.2.8. Usage and Spending Controls – Providing Transparency to the Customer

4.2.9. Zero Rating

4.2.10. Flat rate plans by the hour, day, or month

4.3 Conclusion

5. COMPARISON OF MOBILE BROADBAND PRICING PLANS

5.1 3G Data Services

- 5.1.1 3G Pricing in Brazil
- 5.1.2 3G Pricing in Mexico
- 5.1.3 3G Pricing in Iraq
- 5.1.4 3G Pricing in Belgium
- 5.1.5 3G Pricing Portugal
- 5.1.6 3G Pricing in United Kingdom
- 5.1.7 3G Pricing in India
- 5.1.8 3G Pricing in Philippines
- 5.1.9 3G Pricing in Malaysia
- 5.1.10 3G Pricing in Thailand
- 5.1.11 3G Pricing in Ghana
- 5.1.12 3G Pricing in Nigeria
- 5.1.13 Key Messages

5.2 4G/LTE Data Services

- 5.2.1 4G/LTE Pricing in Canada
- 5.2.2 4G/LTE Pricing in Mexico
- 5.2.3 4G/LTE Pricing in Peru
- 5.2.4 4G/LTE Pricing in USA
- 5.2.5 4G/LTE Pricing in UAE
- 5.2.6 4G/LTE Pricing in Saudi Arabia
- 5.2.7 4G/LTE Pricing in Denmark
- 5.2.8 4G/LTE Pricing in Germany
- 5.2.9 4G/LTE Pricing in Netherlands
- 5.2.10 4G/LTE Pricing in Poland
- 5.2.11 4G/LTE Pricing in Portugal
- 5.2.12 4G/LTE Pricing in Sweden
- 5.2.13 4G/LTE Pricing in Australia
- 5.2.14 4G/LTE Pricing in Hong Kong
- 5.2.15 4G/LTE Pricing in India
- 5.2.16 4G/LTE Pricing in South Korea
- 5.2.17 4G/LTE Pricing in Singapore
- 5.2.18 Key Messages

5.3 HSPA/HSDPA/EVDO Data Services

- 5.3.1 HSPA/HSDPA/EVDO Pricing in Brazil
- 5.3.2 HSPA/HSDPA/EVDO Pricing in Canada
- 5.3.3 HSPA/HSDPA/EVDO Pricing in Chile
- 5.3.4 HSPA/HSDPA/EVDO Pricing in Nicaragua
- 5.3.5 HSPA/HSDPA/EVDO Pricing in Jordan

- 5.3.6 HSPA/HSDPA/EVDO Pricing in Paraguay
- 5.3.7 HSPA/HSDPA/EVDO Pricing in Saudi Arabia
- 5.3.8 HSPA/HSDPA/EVDO Pricing in UAE
- 5.3.9 HSPA/HSDPA/EVDO Pricing in Poland
- 5.3.10 HSPA/HSDPA/EVDO Pricing in UK
- 5.3.11 HSPA/HSDPA/EVDO Pricing in Hong Kong
- 5.3.12 HSPA/HSDPA/EVDO Pricing in Indonesia
- 5.3.13 HSPA/HSDPA/EVDO Pricing in Malaysia
- 5.3.14 HSPA/HSDPA/EVDO Pricing in Singapore
- 5.3.15 HSPA/HSDPA/EVDO Pricing in Kenya
- 5.3.16 HSPA/HSDPA/EVDO Pricing in South Africa
- 5.3.17 Key Messages

6. CUSTOMERS AND MANAGING THE CUSTOMER LIFE CYCLE

- 6.1 Challenges of the operator today
 - 6.1.1. Declining ARPU
 - 6.1.2. Subscriber Churn
 - 6.1.3. Reduced Time to market
 - 6.1.4. New entrants also have level playing field
- 6.2 Customer Life Cycle

7. FUTURE TRENDS AND INNOVATIONS

- 7.1 Mobile Money
- 7.2 Mobile Advertising
- 7.3 New mobile ecosystem and Business models
- 7.4 Mobile data and mobile pricing trends
- 7.5 Product Packaging
- 7.6 Innovations in promotions
- 7.7 LTE Pricing Approaches

8. ACTIONABLE FOR SERVICE PROVIDERS

- 8.1 Values which drives Telecom Operators to become Service Innovators
 - 8.1.1. Rethink and rework on the competition
 - 8.1.2. Deploy end-to-end innovation framework starting with the mobile packet core
 - 8.1.3. Need to tackle the threat from OTT services
 - 8.1.4. Exploit the array of services around the existing services offerings

8.1.5. Provide tools

8.1.6. Price for value

8.2 Stimulate usage – Prepaid and Post-paid

8.3 Reduce Churn-Prepaid and Post-paid

8.4 Customized tariff for the Youth. Business and elderly

8.5 Target them at young (Pre-teen users)

8.6 Target them with special care (Woman)

9. CONCLUSION

9.1 So, what should actually the operators focus upon

9.1.1. Save the customer relationship

9.1.2. Use privacy/security as competitive advantage

9.2 Prepaid is still the cash cow for majority of the operators

10. APPENDIX

List Of Figures

LIST OF FIGURES

Fig 1: Global ICT Developments, 2001-2011

Fig 2: Annual Change in Global ICT Developments, 2001-2011

Fig 3: World Mobile-Cellular subscriptions, 2001-2011, by the level of development

Fig 4: World Fixed (wired) broadband subscriptions, 2001-2011, by level of development

Fig 5: World Active Mobile-broadband subscriptions, 2007-2011, by level of development

Fig 6: World Fixed (wired) and Active mobile-broadband subscriptions, by Region, 2011

Fig 7: Internet usage by age in developing and developed countries, 2011

Fig 8: Worldwide Percentage of individuals using the Internet, 2001-2011 by level of development

Fig 9: Average mobile revenue per subscription, 2010, by level of development

Fig 10-Worldwide Mobile Connections Forecast (2010-2015)

Fig 11 : Worldwide Mobile Broadband Connection Forecast, 2010-2015

Fig 12: Verizon US Pre-paid plans (Illustration)

Fig 13: Sprint Pre-paid plans (Illustration)

Fig 14: Safaricom Kenya Post-paid Plan

Fig 15: Orange Kenya Post-paid Plans (Illustration)

Fig 16: DiGi Hybrid Plan Family Offer (Illustration)

Fig 17: Simply Unlimited Tariff plans from Reliance Communications (Illustration)

Fig 18: Illustration of Pre-paid and Post-paid Mobile internet plans: Vodafone Qatar

Fig 19: Voice and SMS bundled offering from Wataniya Telecom Kuwait (Illustration)

Fig 20: Illustration of Application Bundling

Fig 21: 3G pricing and Pack Affordability Index across major select regions

Fig 22: 3G Data Pricing in Brazil

Fig 23: 3G Data Pricing in Mexico

Fig 24: 3G Data Pricing in Iraq

Fig 25: 3G Data Pricing in Belgium

Fig 26: 3G Data Pricing in Portugal

Fig 27: 3G Data Pricing in United Kingdom

Fig 28: 3G Data Pricing in India

Fig 29: 3G Data Pricing in Philippines

Fig 30: 3G Data Pricing in Malaysia

Fig 31: 3G Data Pricing in Thailand

Fig 32: 3G Data Pricing in Ghana

- Fig 33: 3G Data Pricing in Nigeria
- Fig 34: 4G/LTE Pricing and Pack Affordability Index across major select regions
- Fig 35: 4G/LTE Data Pricing in Canada
- Fig 36: 4G/LTE Data Pricing in Mexico
- Fig 37: 4G/LTE Data Pricing in Peru
- Fig 38: 4G/LTE Data Pricing in USA
- Fig 39: 4G/LTE Data Pricing in UAE
- Fig 40: 4G/LTE Data Pricing in Saudi Arabia
- Fig 41: 4G/LTE Data Pricing in Denmark
- Fig 42: 4G/LTE Data Pricing in Germany
- Fig 43: 4G/LTE Data Pricing in Netherlands
- Fig 44: 4G/LTE Data Pricing in Poland
- Fig 45: 4G/LTE Data Pricing in Portugal
- Fig 46: 4G/LTE Data Pricing in Sweden
- Fig 47: 4G/LTE Data Pricing in Australia
- Fig 48: 4G/LTE Data Pricing in Hong Kong
- Fig 49: 4G/LTE Data Pricing in India
- Fig 50: 4G/LTE Data Pricing in South Korea
- Fig 51: 4G/LTE Data Pricing in Singapore
- Fig 52: HSPA/HSDPA/EVDO Pricing and Affordability Index across major select regions
- Fig 53: HSPA/HSDPA/EVDO Data Pricing in Brazil
- Fig 54: HSPA/HSDPA/EVDO Data Pricing in Canada
- Fig 55: HSPA/HSDPA/EVDO Data Pricing in Chile
- Fig 56: HSPA/HSDPA/EVDO Data Pricing in Nicaragua
- Fig 57: HSPA/HSDPA/EVDO Data Pricing in Jordan
- Fig 58: HSPA/HSDPA/EVDO Data Pricing in Paraguay
- Fig 59: HSPA/HSDPA/EVDO Data Pricing in Saudi Arabia
- Fig 60: HSPA/HSDPA/EVDO Data Pricing in UAE
- Fig 61: HSPA/HSDPA/EVDO Data Pricing in Poland
- Fig 62: HSPA/HSDPA/EVDO Data Pricing in UK
- Fig 63: HSPA/HSDPA/EVDO Data Pricing in Hong Kong
- Fig 64: HSPA/HSDPA/EVDO Data Pricing in Indonesia
- Fig 65: HSPA/HSDPA/EVDO Data Pricing in Malaysia
- Fig 66: HSPA/HSDPA/EVDO Data Pricing in Singapore
- Fig 67: HSPA/HSDPA/EVDO Data Pricing in Kenya
- Fig 68: HSPA/HSDPA/EVDO Data Pricing in South Africa
- Fig 69: MNP promotions by Telecom Service Providers in India
- Fig 70: Total number of countries by region with MNP available to subscribers, June - 2012

Fig 71: GSM and CDMA ARPU comparison in Indian Telecom Market

Fig 72: 2 Major reasons for changing mobile operators (churn)

Fig 73: Strategies to improve Revenues

Fig 74: Components of Structured Marketing Initiative

Fig 75: Customer Engagement at various stages of Customer Life-Cycle

Fig 76: Trust in Advertising among US online consumers

Fig 77: Warid Pre-Paid Offers

Fig 78: Regional LTE pricing approach

Fig 79: Revenue Growth Curve

Fig 80: Challenges in Pre-paid mobile ecosystem for operator

List Of Tables

LIST OF TABLES

Table 1: Global Telecom Indicators for the World Telecommunication Service Sector in 2011

Table 2: Average revenue per mobile-cellular subscription, 2007-2010

Table 3: Types of Convergence and Service Bundling Plans

Table 4: 3G Pricing Comparison across Major Select Regions

Table 5: 3G Data Plans in Brazil

Table 6: 3G Data Plans in Mexico

Table 7: 3G Data Plans in Iraq

Table 8: 3G Data Plans in Belgium

Table 9: 3G Data Plans in Portugal

Table 10: 3G Data Plans in United Kingdom

Table 11: 3G Data Plans in India

Table 12: 3G Data Plans in Philippines

Table 13: 3G Data Plans in Malaysia

Table 14: 3G Data Plans in Thailand

Table 15: 3G Data Plans in Ghana

Table 16: 3G Data Plans in Nigeria

Table 17: 4G/LTE Pricing Comparison across Major Select Regions

Table 18: 4G/LTE Data Plans in Canada

Table 19: 4G/LTE Data Plans in Mexico

Table 20: 4G/LTE Data Plans in Peru

Table 21: 4G/LTE Data Plans in USA

Table 22: 4G/LTE Data Plans in UAE

Table 23: 4G/LTE Data Plans in Saudi Arabia

Table 24: 4G/LTE Data Plans in Denmark

Table 25: 4G/LTE Data Plans in Germany

Table 26: 4G/LTE Data Plans in Netherlands

Table 27: 4G/LTE Data Plans in Poland

Table 28: 4G/LTE Data Plans in Portugal

Table 29: 4G/LTE Data Plans in Sweden

Table 30: 4G/LTE Data Plans in Australia

Table 31: 4G/LTE Data Plans in Hong Kong

Table 32: 4G/LTE Data Plans in India

Table 33: 4G/LTE Data Plans in South Korea

Table 34: 4G/LTE Data Plans in Singapore

- Table 35: HSPA/HSDPA/EVDO Pricing Comparison Across Major Select Regions
- Table 36: HSPA/HSDPA/EVDO Data Plans in Brazil
- Table 37: HSPA/HSDPA/EVDO Data Plans in Canada
- Table 38: HSPA/HSDPA/EVDO Data Plans in Chile
- Table 39: HSPA/HSDPA/EVDO Data Plans in Nicaragua
- Table 40: HSPA/HSDPA/EVDO Data Plans in Jordan
- Table 41: HSPA/HSDPA/EVDO Data Plans in Paraguay
- Table 42: HSPA/HSDPA/EVDO Data Plans in Saudi Arabia
- Table 43: HSPA/HSDPA/EVDO Data Plans in UAE
- Table 44: HSPA/HSDPA/EVDO Data Plans in Poland
- Table 45: HSPA/HSDPA/EVDO Data Plans in UK
- Table 46: HSPA/HSDPA/EVDO Data Plans in Hong Kong
- Table 47: HSPA/HSDPA/EVDO Data Plans in Indonesia
- Table 48: HSPA/HSDPA/EVDO Data Plans in Malaysia
- Table 49: HSPA/HSDPA/EVDO Data Plans in Singapore
- Table 50: HSPA/HSDPA/EVDO Data Plans in Kenya
- Table 51: HSPA/HSDPA/EVDO Data Plans in South Africa
- Table 52: Worldwide Mobile Advertising Revenue (in \$ million) by region, 2010-2015
- Table 53: Worldwide Cost/MB (in \$) mobile data v/s Monthly mobile data traffic (in MB) per smartphone user
- Table 54: Two Major Categories of customers and why they churn

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