

Global Mobile Prepaid Strategies and Forecasts to 2013 – 8th edition

Worldwide Market Analysis, Strategic Outlook & Forecasts to 2013

Now includes in-depth analysis of prepaid markets by region

The market's most authoritative source

Global Mobile Prepaid Strategies and Forecasts to 2013

– **8th edition** is your global strategic guide to prepaid markets, key players and future developments. This exhaustive study will provide you with business critical information on the prepaid sector through a thorough analysis of the new revenue opportunities within this lucrative market.

Brand new data and analysis in this year's report includes:

- **Prepaid market forecasts to 2013** – unique forecasts to 2013 for the prepaid market on a global and regional basis, including prepaid subscriptions, prepaid revenues and prepaid ARPU
- **Exclusive industry survey** – in-depth analysis from an exclusive industry survey carried out in June 2008, in addition to Informa Telecoms & Media's own forecasts for the global prepaid mobile market
- **State of the prepaid market** – a global and region-by-region analysis of the highlights of today's prepaid mobile market, including the evolution of prepaid minutes of use, average price per minute, churn, international prepaid voice and data usage and operators' tariff and recharge strategies for prepaid voice and data services
- **Future prepaid trends** – extensive analysis of the main factors shaping the future of the prepaid mobile market on a global and region-by-region basis, including the sources of future prepaid growth for each region, multi-SIM ownership, prepaid non-voice services, competitive and regulatory factors, future tariff structures, the impact of recharge denominations on prepaid adoption and usage and operator strategies

See inside for more details on what's new in this edition

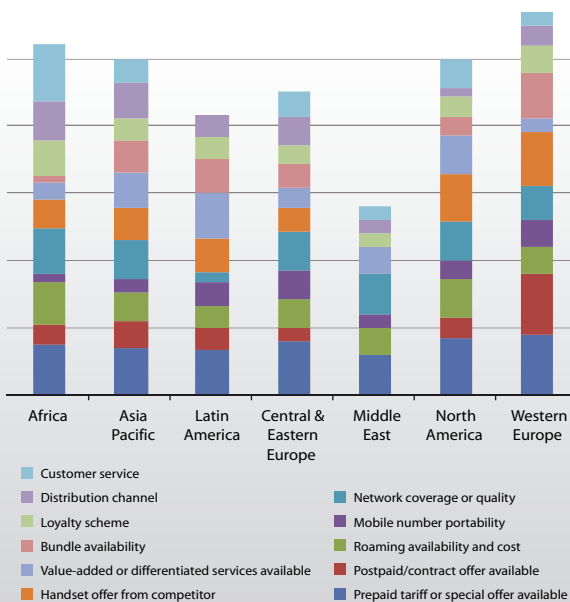
Global Mobile Prepaid Strategies and Forecas



“ Prepaid mobile subscriptions are out-growing the mobile market overall and the penetration of prepaid is increasing globally. By March 2008, 68% of the world’s subscription base was prepaid, accounting for 2.37 billion subscriptions. Prepaid is still growing, with new services such as mobile data increasing the number of prepaid SIMs in the subscription base. ”

Sue Uglow, Associate: Global Mobile Prepaid Strategies and Forecasts to 2013

2008 SURVEY RESULT SAMPLE – WHY PREPAID CUSTOMERS MIGHT CHURN TO A COMPETITOR FOR ALTERNATIVE PREPAID SERVICES



Source: Informa Telecoms & Media

In developed markets, operators are focusing on migrating prepaid customers onto contracts. With a significant portion of their marketing effort allocated to contract customers, there is still a certain stigma attached to being a prepaid customer rather than a contract customer.

However this attitude is starting to change as operators understand that prepaid customers can actually contribute more to the bottom line than expensive contract customers, and that by ignoring over 50% of their subscription base they are missing out on a significant revenue stream. Increasingly the dividing-line between contract and prepaid is blurring, as contracts become shorter, SIM-only deals proliferate, and prepayment mechanisms for contract add-ons become the norm. To maximise the value of prepay, operators need to become much better at enabling customers to tailor their services to their needs to improve retention and develop customer lifetime value and profitability.

This report analyses operators’ current approaches to prepaid mobile and how they are changing their strategies to maximise revenue opportunities. This edition supplies business critical information, exclusive forecasts to 2013 and commentary on the global market, strategies for pricing, data services and recharge mechanisms.

ESSENTIAL READING FOR ALL PARTIES INVOLVED IN THE PREPAID VALUE CHAIN, THIS REPORT IS AN INVALUABLE STRATEGIC TOOL FOR:

Operators

Learn how to maximise profits from your prepaid customer base

Prepaid platform and billing vendors

Understand market drivers, key developments and analyse operator strategies

Regulators

Understand how regional operators are responding to international prepaid usage trends

Suppliers of electronic recharge solutions

Assess where the real opportunities lie and discover how to get ahead of the competition

Handset vendors

Analyse current prepaid usage and likely developments and optimise handset design to suit operators’ and users’ needs

Industry analysts and investors

Benefit from a thorough picture of the market, and receive expert analysis and forecasts on which to base your business decisions

Financial services organisations

Understand the synergy between prepaid mobile customers and their banking and payment needs

EXPERT FORECASTS FROM 2008-2013 IN THIS REPORT

This invaluable information has been produced by Informa Telecoms & Media’s expert forecasting team and based on the extensive data held within the World Cellular Information Service.

This information will enable you to base your decisions on the most comprehensive and reliable market forecasts available.

FORECASTS INCLUDE:

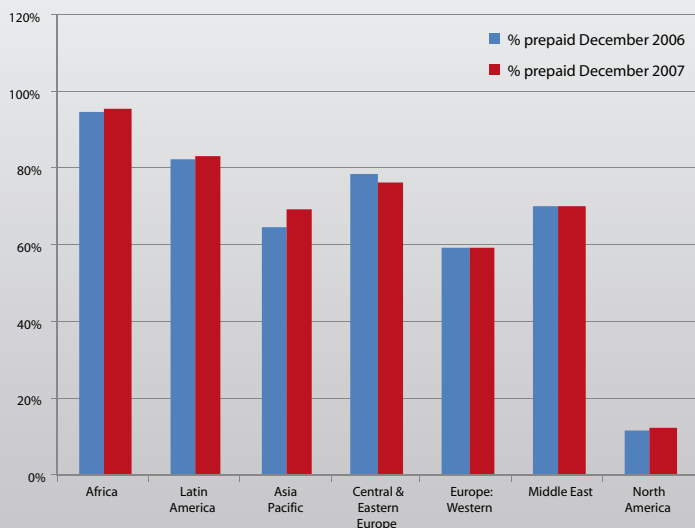
- » Total subscriptions
- » Prepaid subscriptions
- » Prepaid subscription as % total subscriptions
- » Net total additions
- » Net prepaid additions
- » Growth in total subscriptions (%)
- » Growth in prepaid subscriptions (%)
- » Total mobile revenues (US\$)
- » Total prepaid mobile revenues (US\$)
- » Blended ARPU (US\$)
- » Prepaid ARPU (US\$)

In developing regions, prepaid is king. There is extensive innovation in terms of designing tailored packages for prepaid customers and as a result prepaid customers are often able to access more advanced services than in developed markets. However, in these regions, operators are at a tipping-point and need to balance the need to acquire share of very low-spending customers to increase their prepaid base, versus the need to develop increased value from existing prepaid customers in the long-term. Differentiation will shift from price to value, and the role of new services that maximise the worth of the mobile handset will be key to growth.

THIS REPORT ANSWERS BUSINESS CRITICAL QUESTIONS

- ✓ How big is the prepaid market in each region and how is it evolving?
- ✓ What is the impact of multi-SIM ownership on the size of the prepaid market?
- ✓ How is mobile data affecting demand for prepayment mechanisms?
- ✓ What opportunities are there for growing the prepaid market beyond voice in developed and developing countries?
- ✓ What kinds of new mobile applications can help us reach the unreached and can we do this profitably?
- ✓ What kinds of tariff plans are most successful in addressing the needs of different customer segments?
- ✓ Does dropping prices mean we will be able to increase prepaid minutes of use?
- ✓ How can operators in developed countries learn from their counterparts in developing countries in terms of marketing to their prepaid customers?
- ✓ What contribution are prepaid services making to our bottom line?
- ✓ How are converged billing systems helping with segmenting the prepaid customer base?
- ✓ What are the most successful ways of keeping prepaid customers and their revenue on our network?
- ✓ How can we develop loyalty among our prepaid customer base?
- ✓ How will the regulatory and competitive environment in each region impact the development of the prepaid business model?

PREPAID PENETRATION BY REGION 4Q07



Source: Informa Telecoms & Media

EXCLUSIVE INDUSTRY SURVEY RESULTS

Global Mobile Prepaid Strategies and Forecasts to 2013 also includes the results of a survey of key global prepaid operators. As well as appearing as an Appendix, the results of the survey are integrated throughout the report, ensuring the information you receive is entirely unbiased and based on current industry opinion.



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*Contents correct at time of printing

Informa Telecoms & Media is the leading provider of market intelligence to the global telecoms and entertainment industries. Our clients receive business-critical strategic information, advice and forecasting on all aspects of converging mobile, entertainment and fixed telecoms markets.

Mobile Operator Intelligence Centre

Operators are being impacted by regulation, technology, price and competition from low-cost competitors. The Mobile Operator Intelligence Centre provides complete coverage of the strategies, tactics and trends surrounding the issues.

The service includes detailed coverage of the top 40 global operating groups as well as profiles of all significant operators worldwide. The service also covers key trends in mobile telecoms and extensive KPI data (subscription numbers, revenues, ARPU) M&A, regulation, licensing and technology coverage.

For a detailed breakdown of content in this intelligence centre, visit www.intelligencecentre.net/mo



Future Mobile Operator Business Models: Broadband, Partnerships, Wholesale and Mobile 2.0

Future Mobile Operator Business Models assesses how quickly mobile operators need to look towards new business models and analyses the key threats and opportunities.

Coverage includes:

- In-depth assessment and analysis in developed and emerging markets in the period 2005 – 2007
- Breakdown and analysis of the key threats that mobile operators face
- Analysis of the key opportunities for mobile operators to protect and grow their profit margins
- Key case studies
- Regional forecasts to 2012 for key operators KPIs

For more information and to download a full table of contents, visit www.informatm.com/fmobm



Future MVNO Strategies: Customer Segmentation and Market Evolution - 3rd Edition

This strategic report provides essential analysis on the developments in the MVNO sector. The study includes detailed analytical and qualitative analysis of the MVNO business opportunity, supported by detailed forecasts to 2013 by country and includes 35 country profiles.

For more information and to download a full table of contents, visit www.informatm.com/mvnoreport



Global Mobile Roaming: Operator Strategies and Market Trends - 3rd edition

Roaming is a global business and this report gives high-level views and analysis of opportunities on a worldwide scale.

Global Mobile Roaming evaluates the key issues surrounding the current roaming market and its likely future development, providing a unique combination of high-level market analysis, detailed case studies PLUS exclusive market forecasts to 2013.

For more information and to download a full table of contents, visit www.informatm.com/gmroaming



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