

## Mobile Network Providers - UK - March 2012

Report Price: £1750 / \$2758 / €2087

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“Initial enthusiasm for mobile network issued bank cards appears to be subdued, with only 14% of mobile phone users saying that they would use a debit or credit card issued by their mobile network operator. However, network operators are in a good position to provide payment services in addition to added-value services that they already offer, such as location-based discount and reward schemes for existing mobile customers, as a mobile wallet package.”

– Cecilia Liao, Senior Technology Analyst

### In this report we answer the key questions:

- Who will dominate the mobile wallet market?
- What needs to be done to get UK consumers ready for mobile wallets?
- What can mobile network providers specifically do to increase consumer confidence in their version of mobile wallet services?
- To what extent will the adoption of smartphones and data plans affect SMS usage in the UK?

Uptake of mobile phone subscriptions has increased steadily over the past five years, rising by an estimated 0.4% in the year to 2011, to reach 83.2 million subscribers. Revenue is estimated to be flat for the year to 2011 at £15 billion, partly because of the availability of cheaper monthly contracts (for example, sub-£15 mobile contracts) and more consumers opting for the cheaper packages, which has had a dampening effect on overall average revenue per user (ARPU).

Consequently, mobile network operators are looking for ways to increase overall ARPU and reduce churn in addition to selling more data packages in order to boost overall revenues. One critical area that mobile network operators are looking into is mobile wallet services, including loyalty programmes and mobile payments delivered on mobile handsets. This report examines the market for UK mobile network providers, exploring which mobile networks, network services, and payment plans that UK consumers are using.

The report's brand research investigates how consumers feel about the four mobile network operators in the UK (with Orange and T-Mobile analysed separately). The report also looks into consumer attitudes towards mobile network providers, the reasons why some consumers have switched network providers in the past 12 months, what consumers think of mobile wallets, and reasons as to why some consumers dislike the idea of mobile payments.

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