

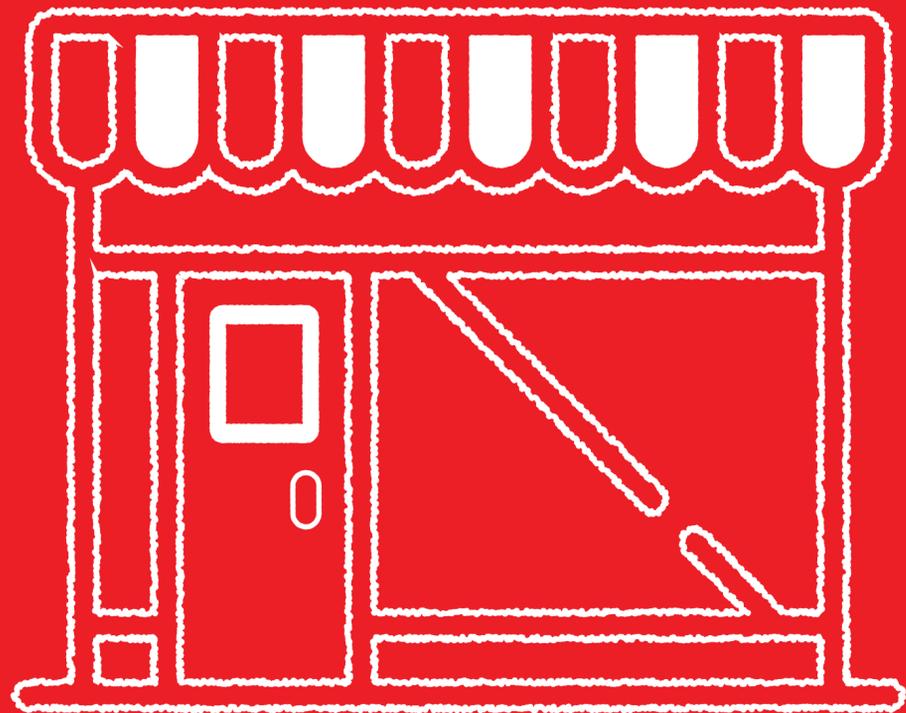


What's the difference  
between a retail MVNO

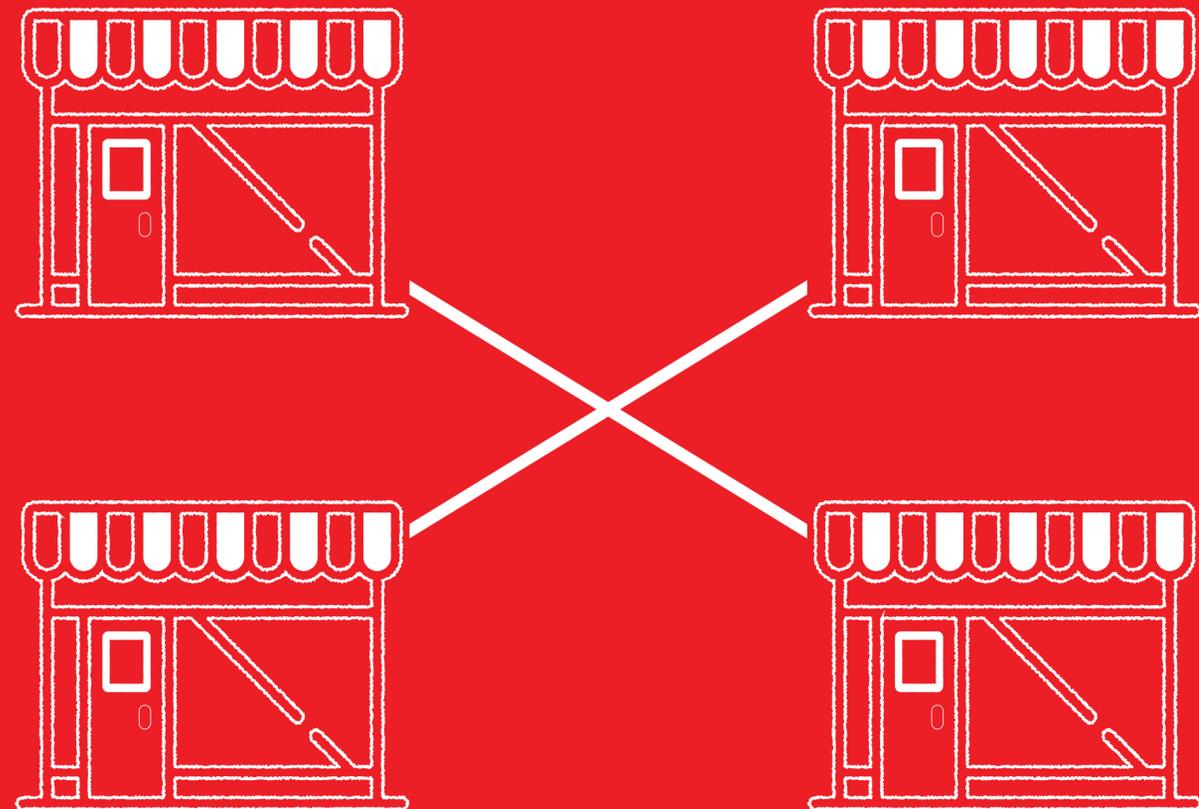
and a fish finger?

Why do retailers make  
successful MVNOS?

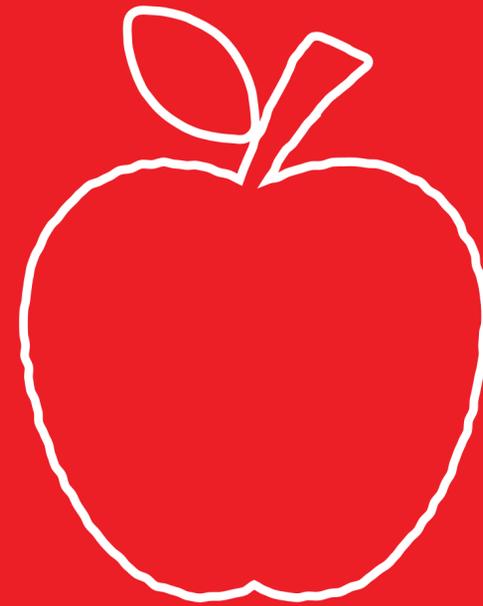
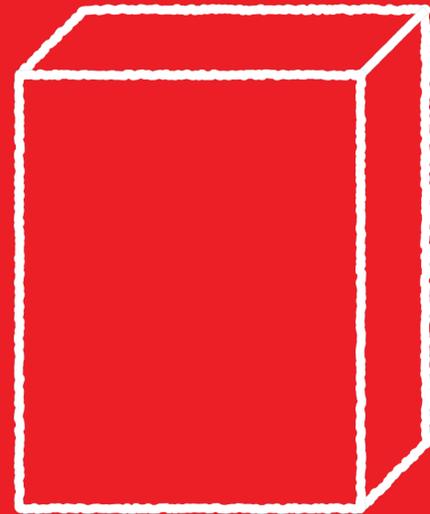
# Your brand



# Your distribution network



# Your supporting product lines



**And a fish finger?**

...fish fingers don't build brands,  
**but retail MVNOs can.**

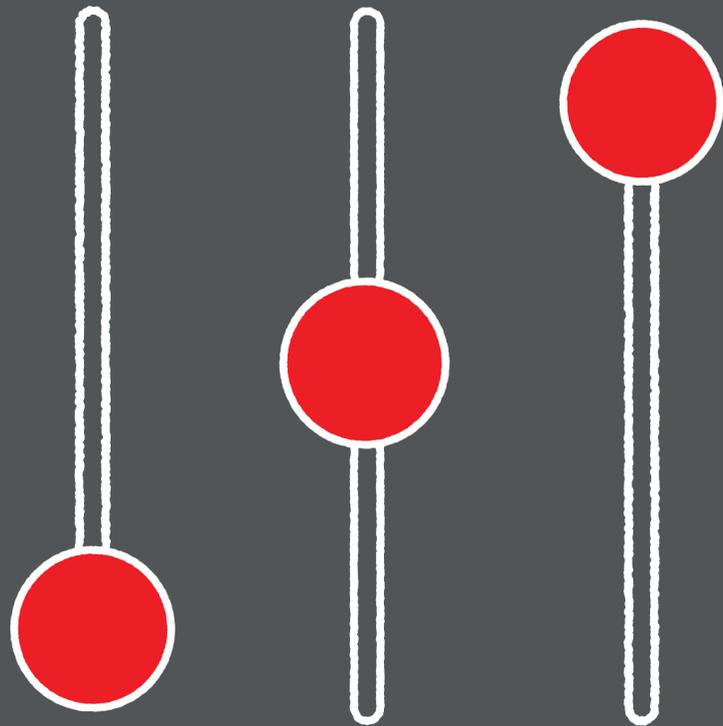
The background features several red line-art watches of various styles, including round and rectangular faces with straps. Horizontal motion lines are scattered around the watches, suggesting movement and change. The overall aesthetic is modern and minimalist.

The times,  
**they are a changing.**

Most retail MVN0s are built on  
**a declining pre-pay model**

Competing on  
**price only**

# Whilst families want



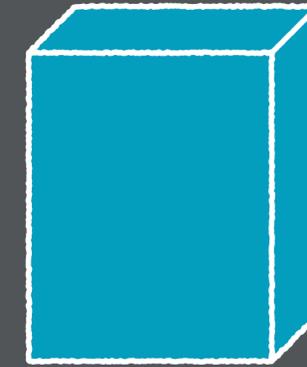
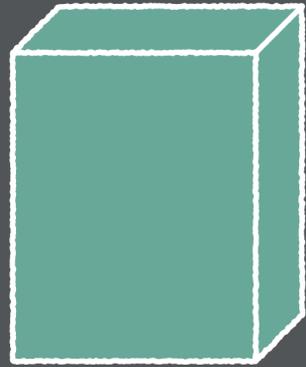
Control



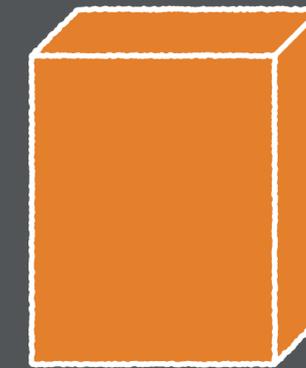
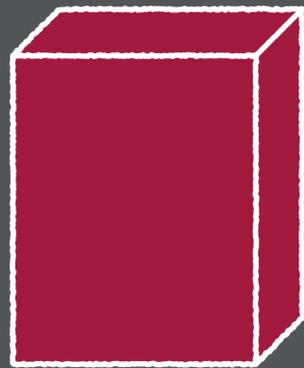
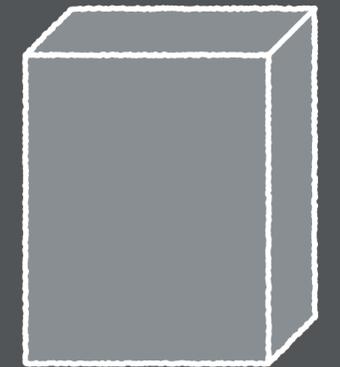
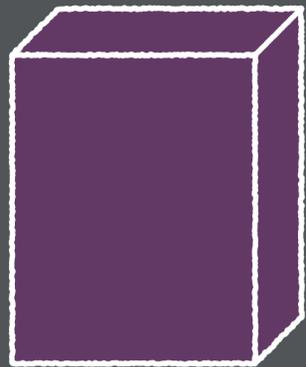
Transparency



Sharing



A traditional product  
line approach  
misses the **real  
strategic value**



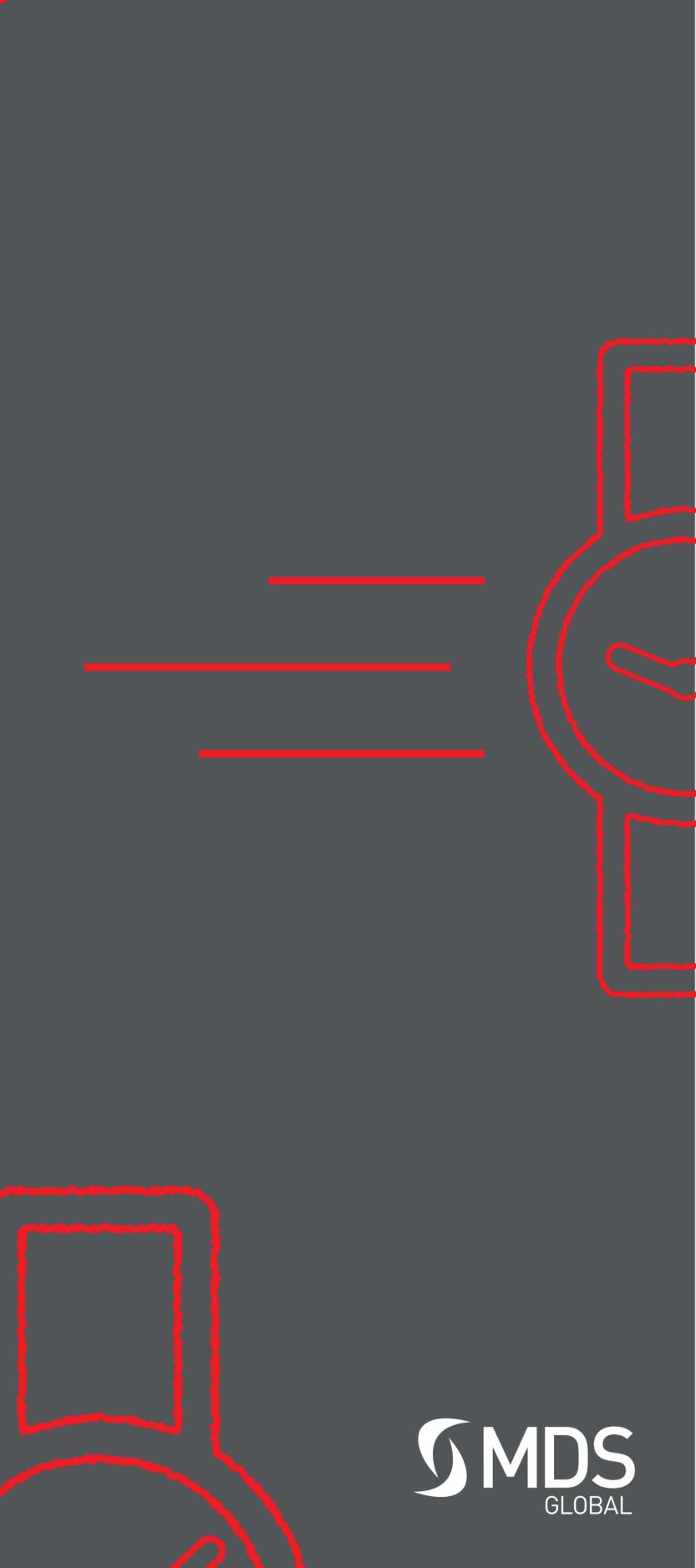


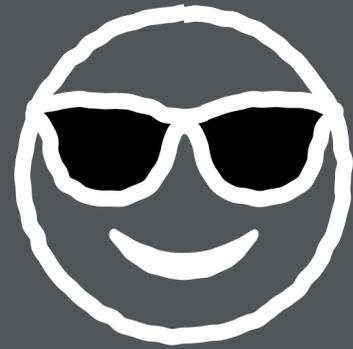
**Millennials want:**

Digital experiences

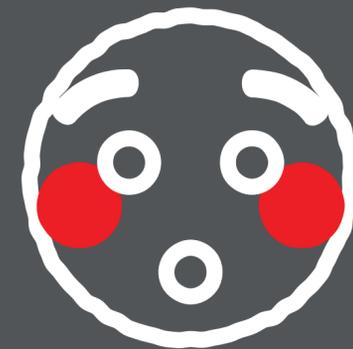
Real time updates

24/7 usage





Millennials are  
**redefining expectations**





Is your network operator  
**really** helping?

**And a fish finger?**

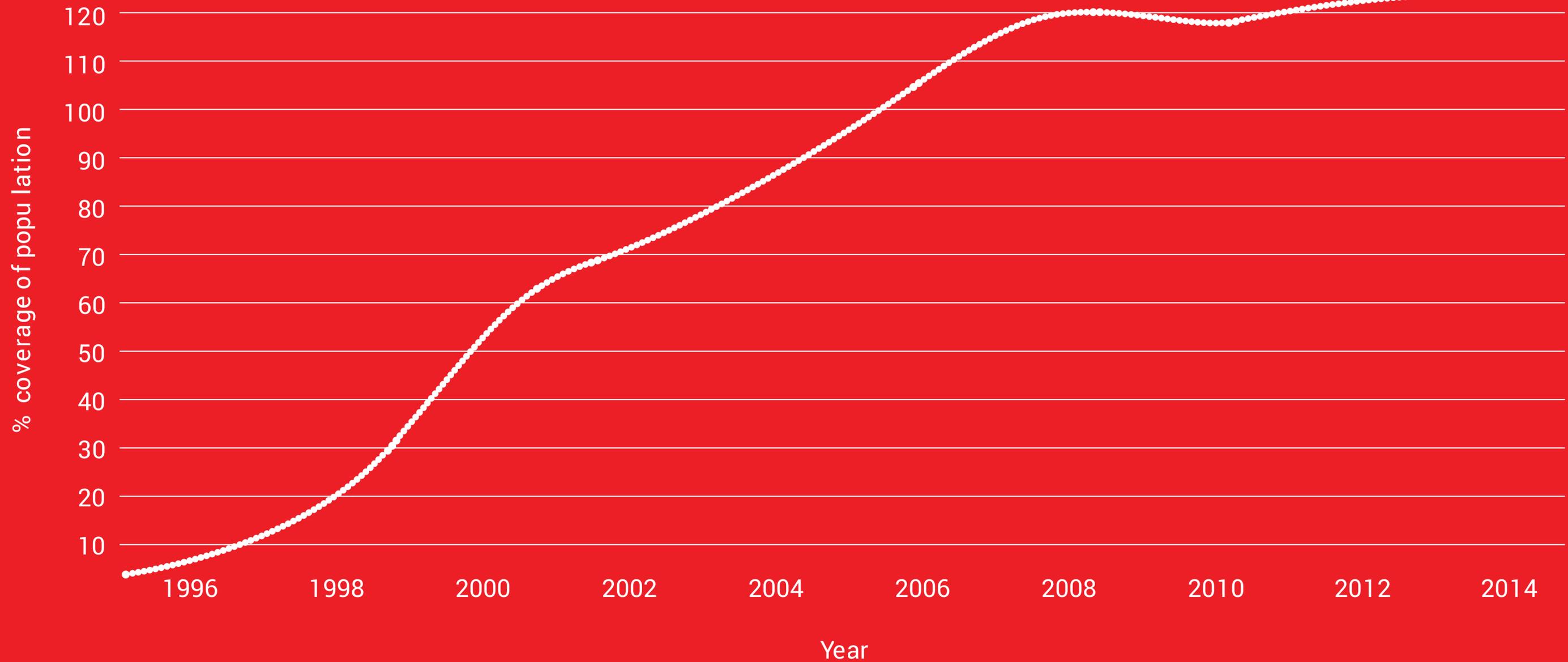
A fish finger can't tell you  
**that a customer has walked  
into a competitor's store.**

# The growth of post-pay

75%

post-pay in  
North West  
Europe

# Growth of post-pay in the European Union



GSMA (2013)



Average  
smartphone data  
usage increased by **43%** globally  
in 2015

Average  
smartphone data  
usage increased by **43%** globally  
in 2015

Global data  
usage increased **74%** in  
2015

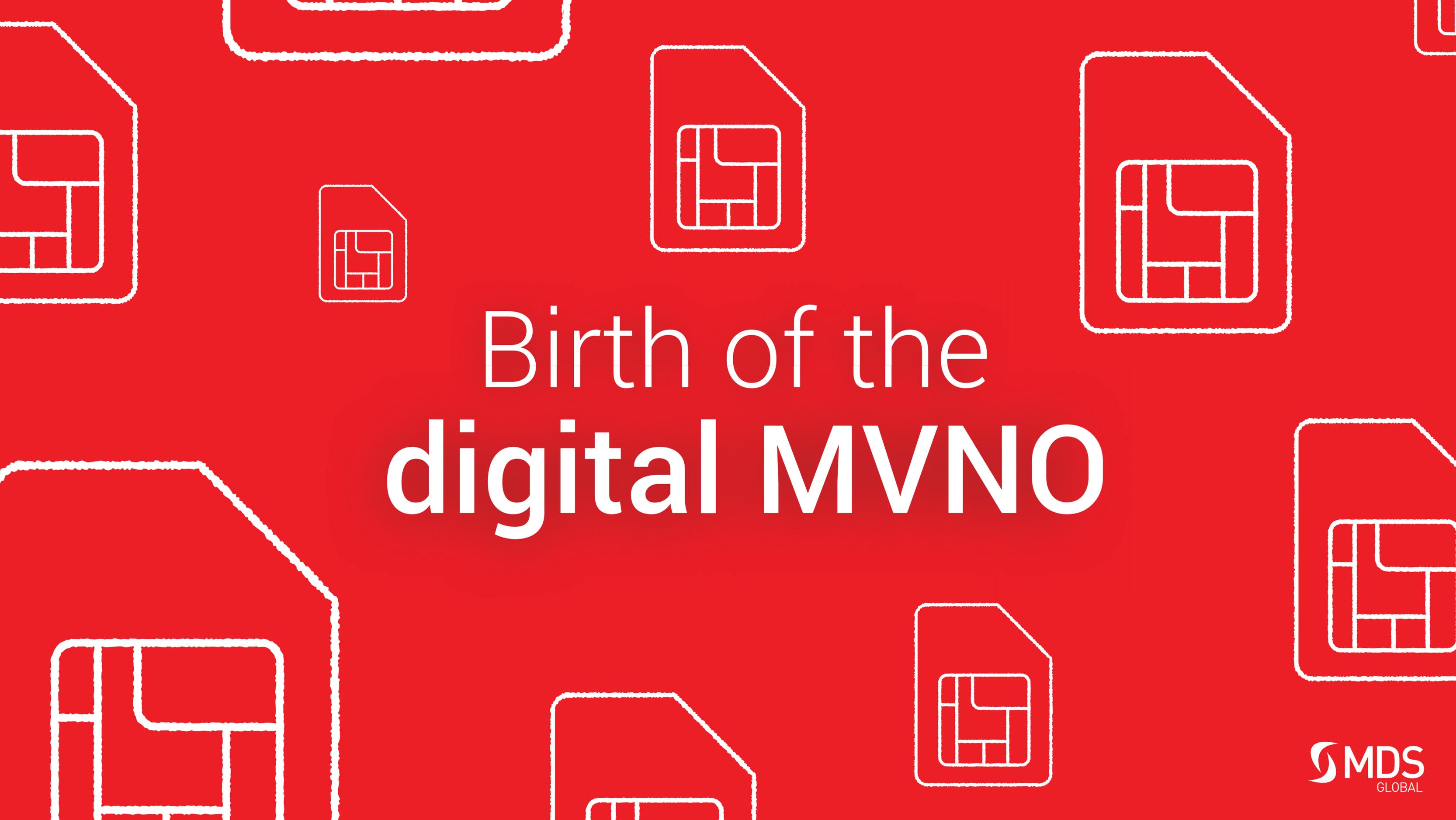


Consumers want  
**seamless digital  
experiences**

**And a fish finger?**

A consumer doesn't look at a fish  
finger 200 times a day.

**They do with a smartphone.**



# Birth of the digital MVNO



A **digital MVNO** (or a Digital Service Provider if you want to use the telco lingo) focuses on customer experiences that **put the consumer in control**

Viewing **real-time usage** at 2am

**Sharing data** with your family to suit

**Buy add-ons** whilst commuting

Pay monthly bill **via an app**

Empowers the consumer to create  
**personalised bundles**



Do not pass  
**post-pay**

go straight to  
**Digital MVNO**



You don't tell customers what to put in their basket, **so why should your MVNO be any different?**



Millennials crave the  
responsiveness, flexibility and  
freedom a digital MVNO can offer



Over

60%

of Millennials use their  
smartphone or tablet to  
research products and  
services on the go



Millennials are the **ideal target**  
for the digital MVNO

Millennials are **data driven**



Key demographic for future growth

Millennials  
account for

**24%**

of Europe's population,  
and are the **highest**  
**users of data**

Pew Research (2015)



Over

50%

of Millennials  
research the market  
before buying

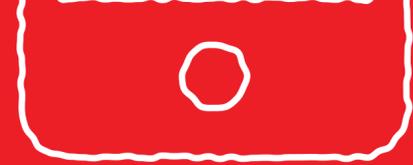
“

The big four grocers need to develop strategies to defend and win back their share of the Digital Devotee customer segment who have a 16% greater propensity to shop with a discount retailer

”

James Gray - Managing Director, Graystone Strategy

Millennials love to  
#participate and #engage  
with your @brand



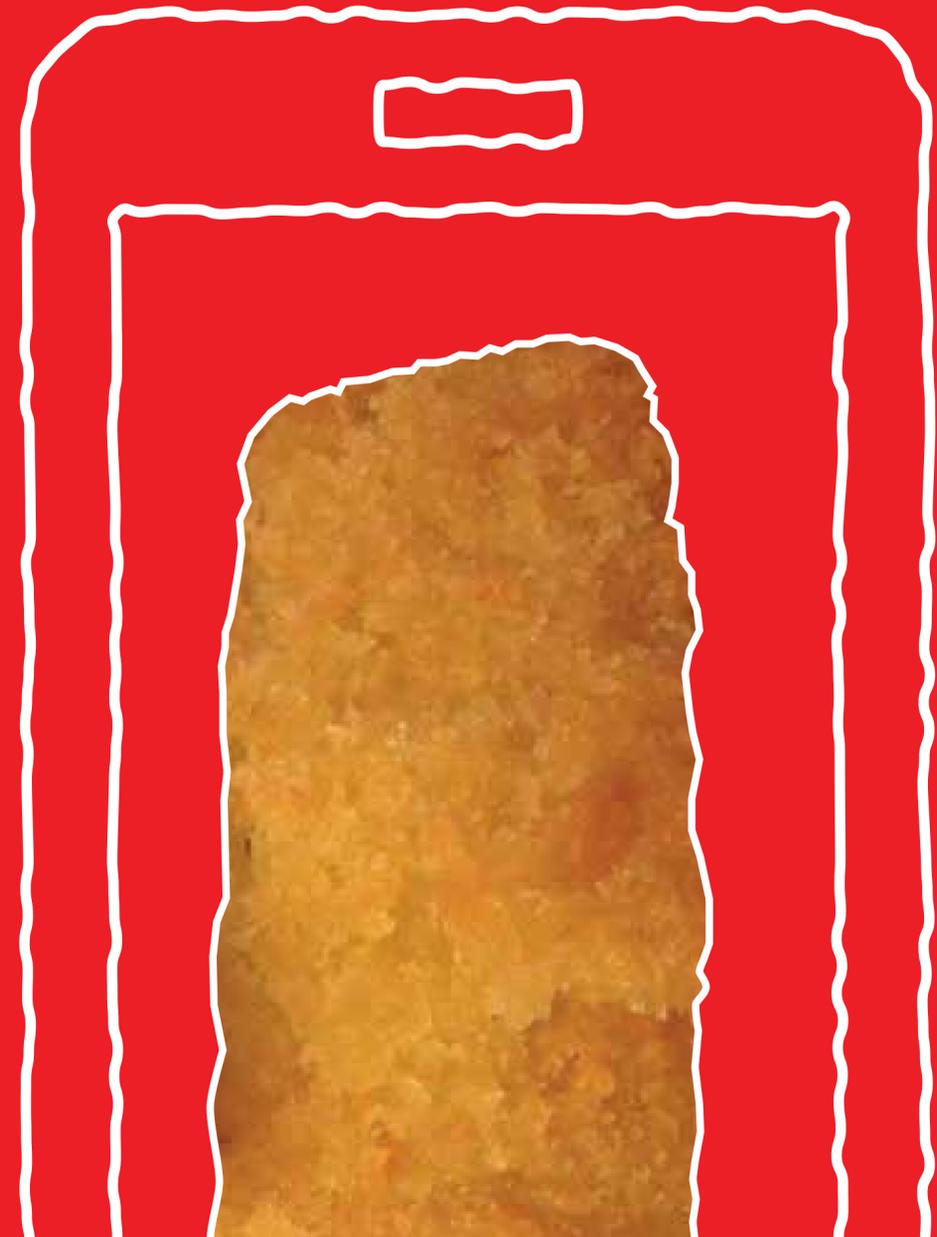
Millennials want loyalty  
rewards **in real time**

Millennials are more than **twice as likely**  
than any other age group to want to track  
their rewards **from a mobile app**



# And a fish finger?

Fish fingers aren't  
a differentiated  
way to **reward**  
**your customers.**  
Mobile data is.



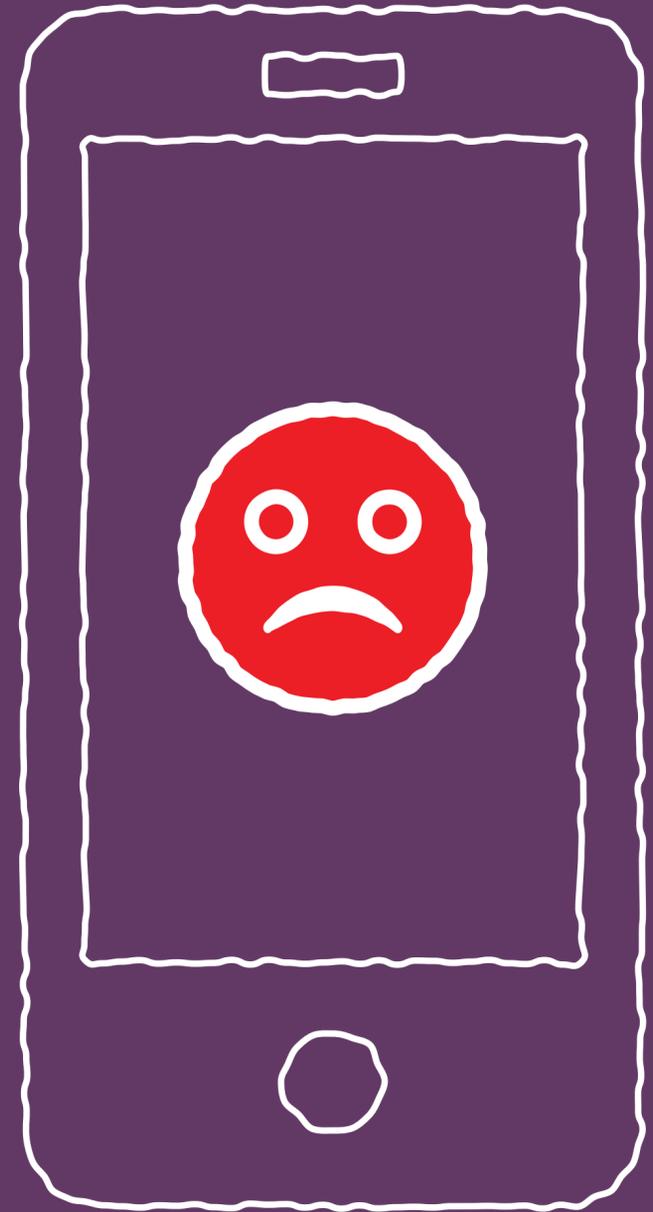
But what about my  
**strategic value?**

“

If you're not using  
mobile, you don't have  
a digital strategy

”

Retailers that have failed  
to leverage mobile  
**have failed overall**



If **1%** of retail  
customers use  
your MVNO

that could drive **behavioural insight**

about  
the other **99%**

An MVNO is a  
**huge strategic asset**

And a fish finger?

Fish fingers don't enable  
brand building through  
**frequent customer contact.**

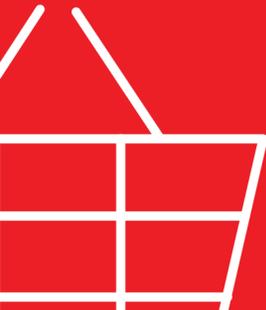
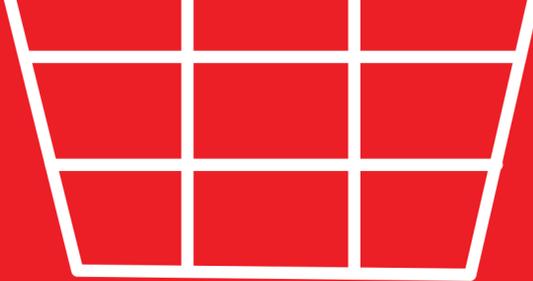


Digital MVNO  
**driving loyalty**

“

Ask not what the brand  
can do for your retail  
MVNO, but what the  
retail MVNO can do for  
your brand

”

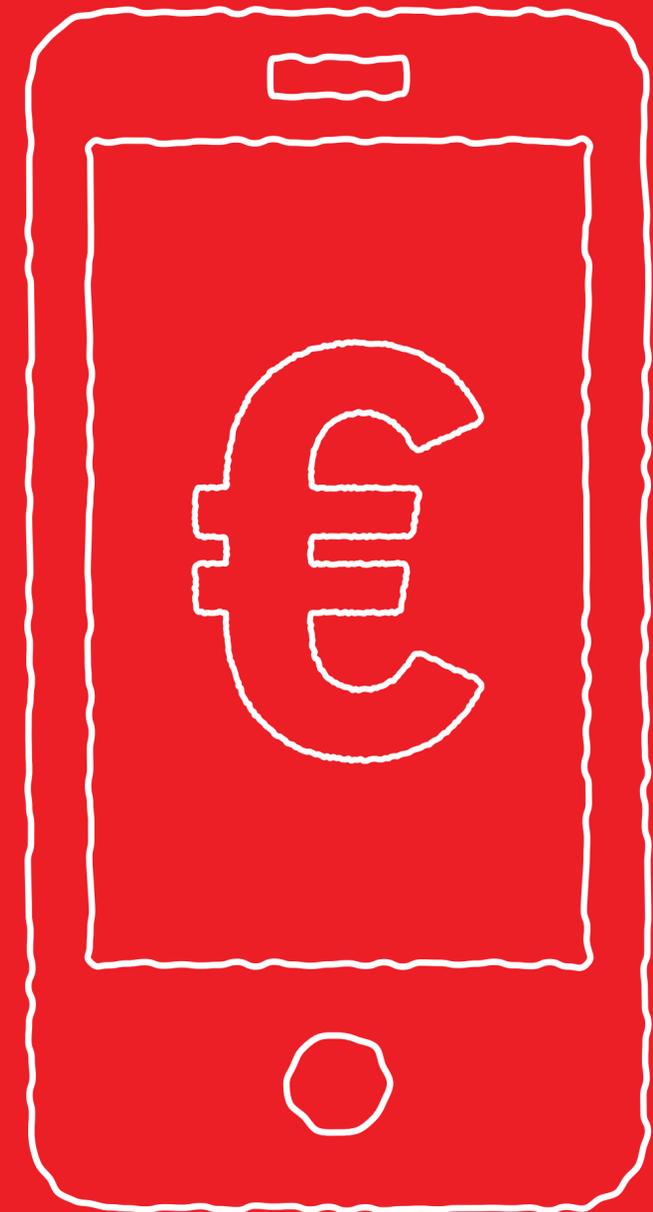


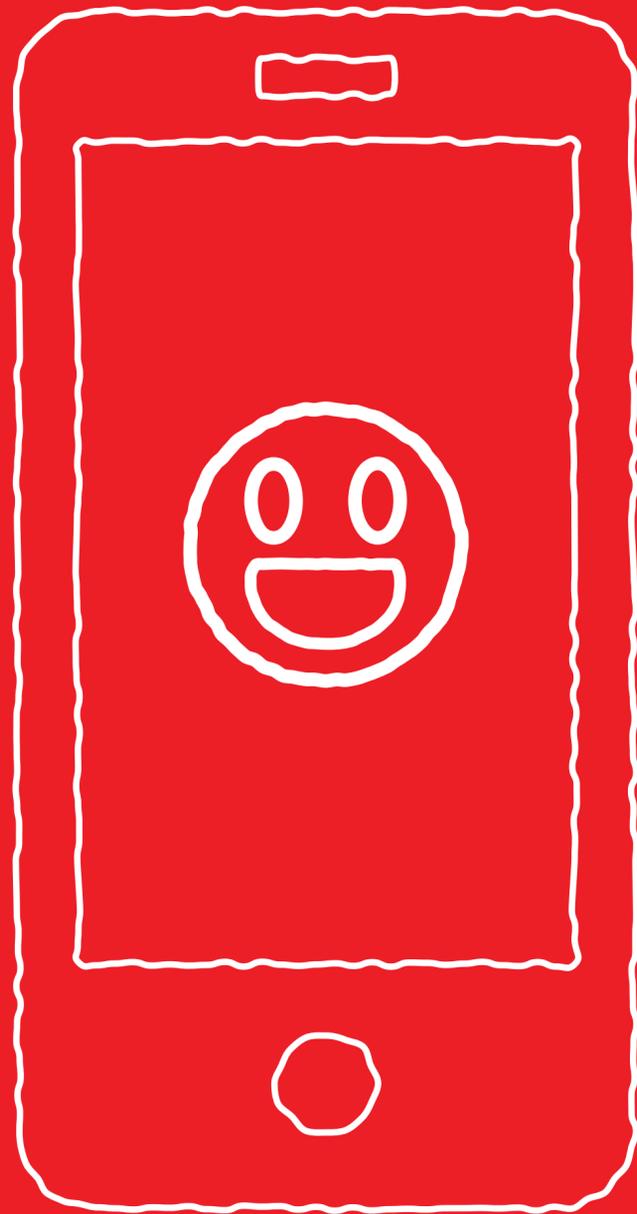
# 19%

greater basket  
spend after  
moving to post-  
pay retail MVNO

MDS (2016)

Mobile marketing  
campaigns deliver  
**twice the ROI** of  
traditional campaigns





Data from digital MVNO  
allows personalisation

# Today's loyalty schemes

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## Pros

- Greater Insight
- Opportunity to innovate

## Cons

- Lack differentiation
- Costly to reward



Immediately reward loyal customers  
with a **shareable data bundle**

Become an individual or family  
incentive **at low cost**

# And a fish finger?

Fish fingers aren't an appealing yet low cost loyalty reward. **Mobile data is.**

How do you become a  
**digital MVNO?**



VNOOnDemand

Freedom to  
**innovate, disrupt and excite.**

# VNOnDemand

is a BSS-as-a-Service specifically configured to provide MVNOs the freedom they need to deliver profitable services.

**So stop treating your  
MVNO as just another  
product line and embrace  
its strategic potential**

MDS Global has helped retailers like

**Carphone Warehouse**

with their iD Mobile MVNO navigate  
the challenges of digital transformation.

Contact us to unleash the true  
strategic value of your MVNO.

[mdsglobal.com](https://mdsglobal.com) >