

# CMR15 telecoms section charts

# Industry metrics and summary

# Figure 4.1

## UK telecoms industry: key statistics

	2009	2010	2011	2012	2013	2014
Total operator-reported revenue (£bn)	41.3	40.4	39.9	39.4	38.1	37.4
Operator-reported retail revenue (£bn) (excluding CDS)	27.9	27.8	28.0	28.5	28.4	28.5
Operator-reported wholesale revenue (£bn)	10.6	9.9	9.2	8.2	7.0	6.2
Average monthly household telecoms spend (£, 2014 prices)	87.20	86.50	84.63	84.00	81.40	81.30
Fixed access and call revenue (£bn)	9.6	9.3	9.0	8.8	8.7	8.5
Fixed internet revenue (£bn)	3.2	3.3	3.5	3.8	4.2	4.8
Fixed lines (millions)	33.5	33.4	33.3	33.2	33.3	33.2
Fixed broadband connections (millions)	18.4	19.6	20.7	21.8	22.8	23.7
Broadband connections with headline speed $\geq 30$ Mbit/s (millions)	0.0	0.2	1.0	3.1	5.3	7.1
Fixed voice call minutes (billions)	128	123	111	103	92	80
Mobile retail revenues (£bn)	15.0	15.1	15.4	15.9	15.6	15.3
Mobile voice call minutes (billions)	127	131	131	132	135	137
SMS & MMS messages sent (billions)	106	129	150	151	129	110
Mobile data volumes (PB)	-	-	-	-	283	533
Active mobile subscriptions (millions) (including M2M)	80.6	81.5	82.2	83.2	82.7	83.7

Source: Ofcom / operators

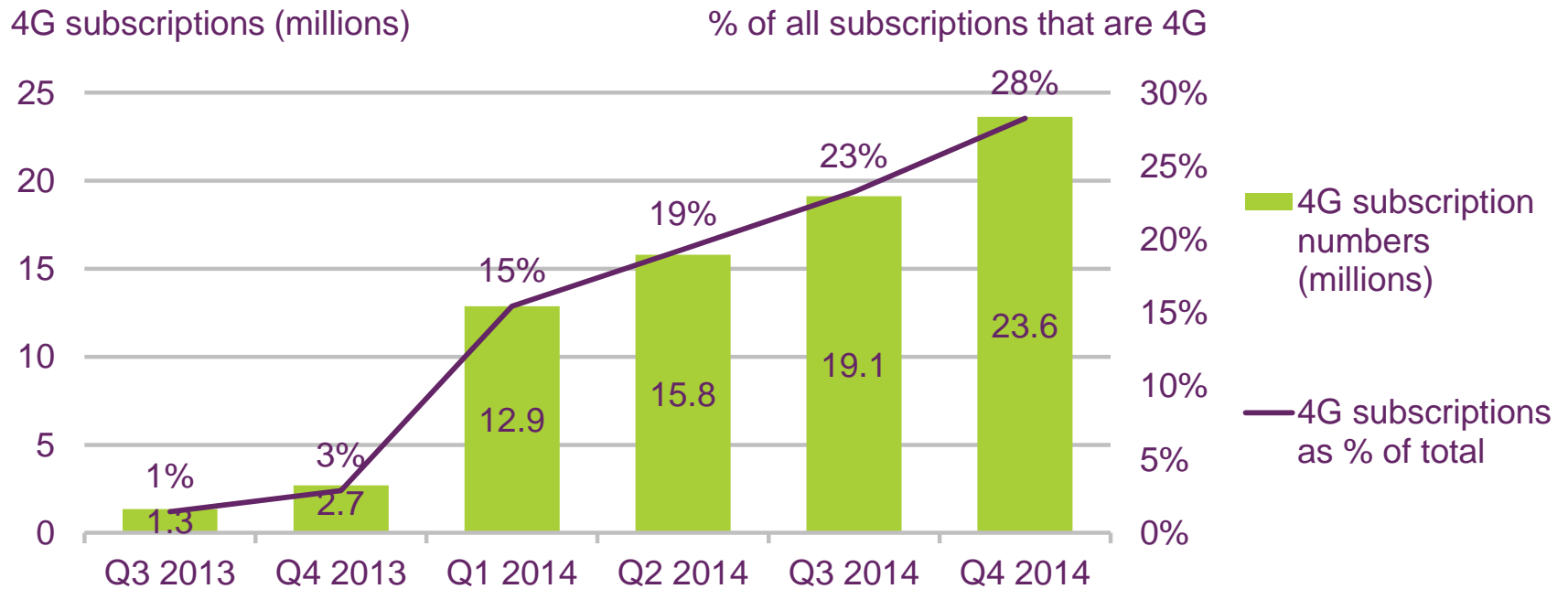
Notes: CDS refers to corporate data services; connection figures are at year-end.

# Key market developments

4G

## Figure 4.2

### Total 4G subscription numbers



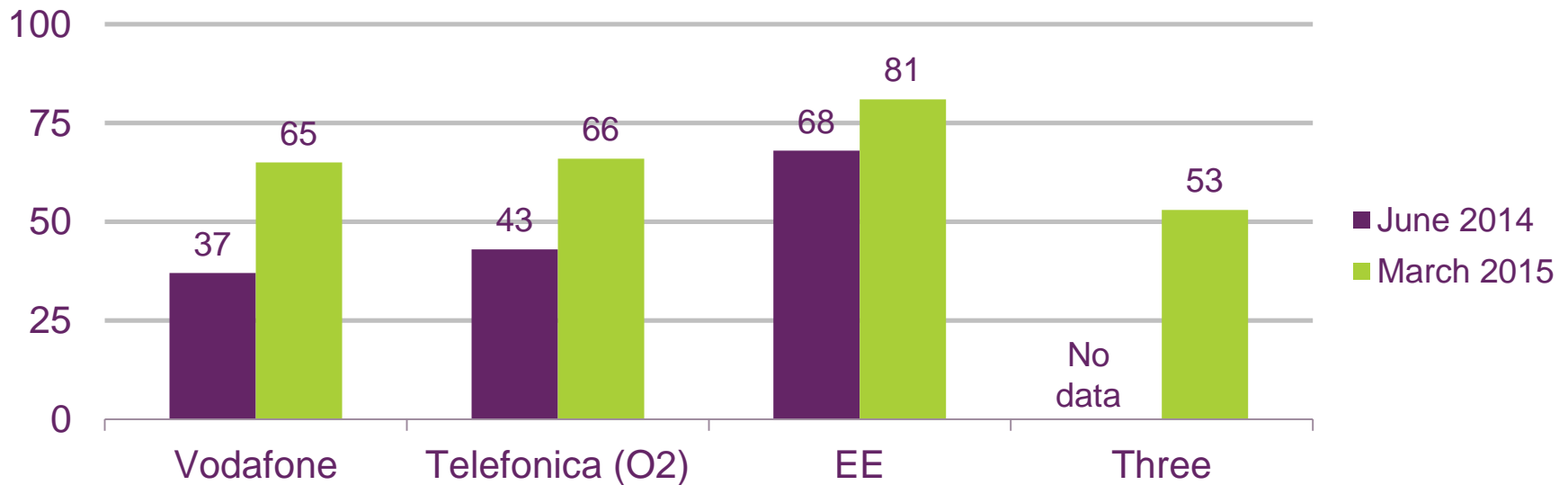
Source: Operator data

Note: Includes all consumers whose tariff allows them to access 4G mobile services, even those without a 4G-enabled device or in areas where their provider has no 4G coverage.

## Figure 4.3

### 4G outdoor premises coverage, by network

4G premises coverage (%)



Source: Ofcom mobile broadband performance reports, November 2014

[<http://stakeholders.ofcom.org.uk/binaries/research/broadband-research/mbb-nov14.pdf>] & April 2015

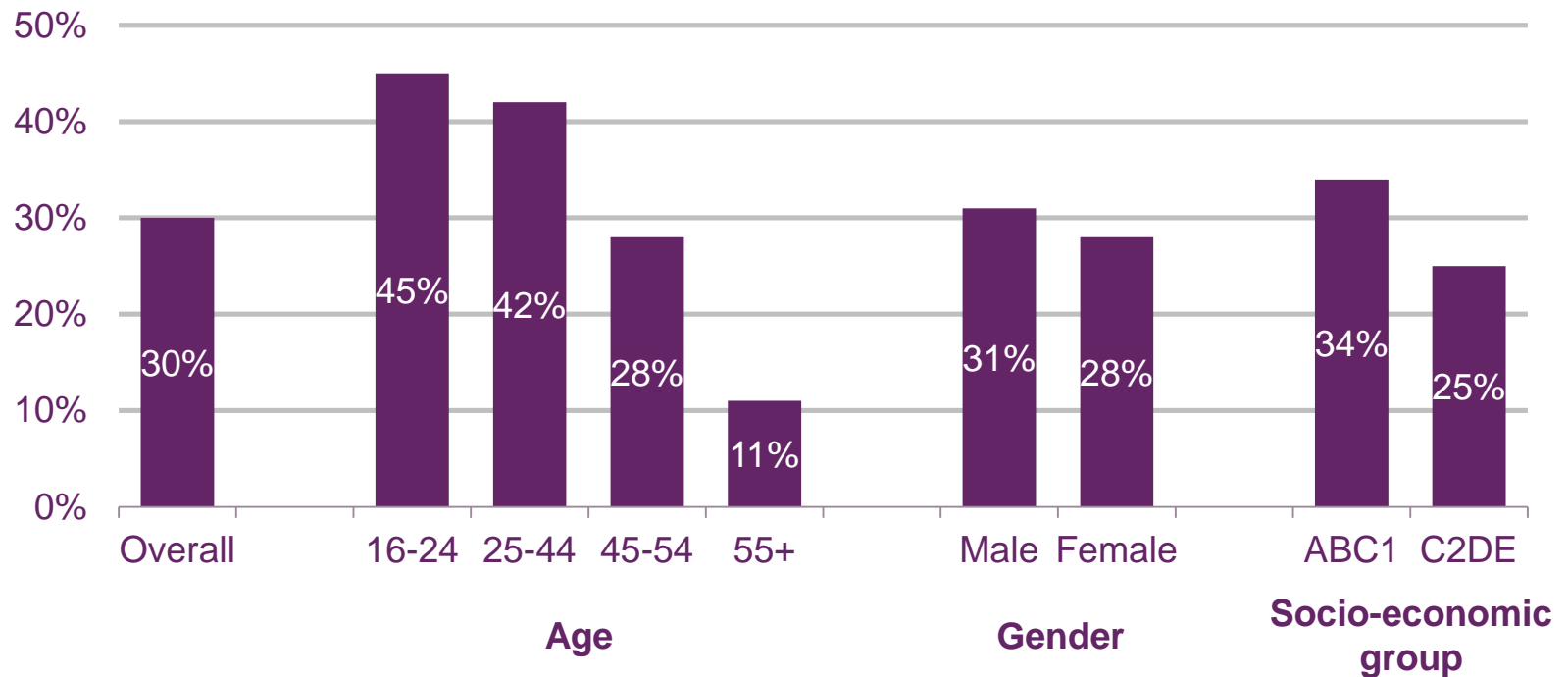
[[http://stakeholders.ofcom.org.uk/binaries/research/broadband-research/april15/Ofcom\\_MBB\\_Performance\\_Report\\_April\\_2015.pdf](http://stakeholders.ofcom.org.uk/binaries/research/broadband-research/april15/Ofcom_MBB_Performance_Report_April_2015.pdf)]

Note: 4G coverage data were not available for Three in June 2014.

## Figure 4.4

### 4G take-up overall, by age, gender and socio-economic group

% of respondents



Source: Ofcom Technology Tracker. Data from wave 1, 2015

Base: UK adults 16+, ABC1 (1948) C2DE (1807) male (1832) female (1924) 16-24 (514), 25-44 (1247), 44-54 (1447) and 55+ (1447)

QD6 (QD41) Do you have a 4G service? This is a relatively new service that enables faster mobile internet

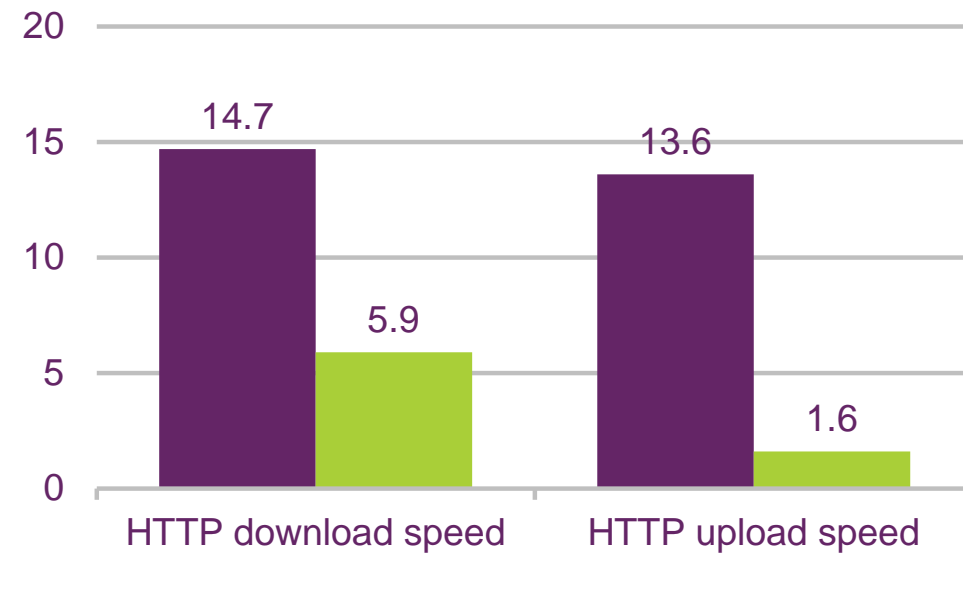


## Figure 4.5

Average 4G and 3G HTTP download, upload and web browsing speeds overall: Q4 2014

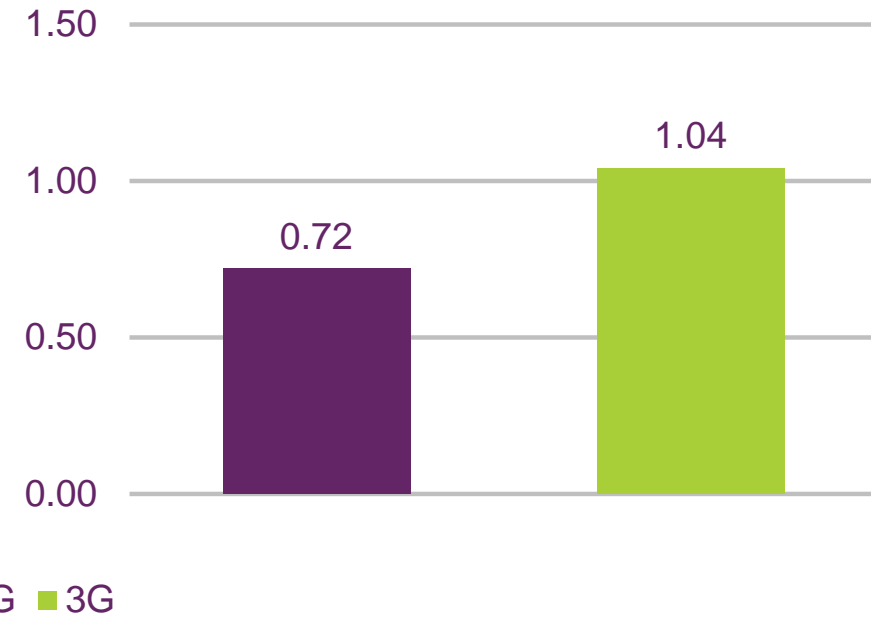
### HTTP download and upload speeds

Average speed (Mbit/s)



### Web browsing speed

Average speed (seconds)



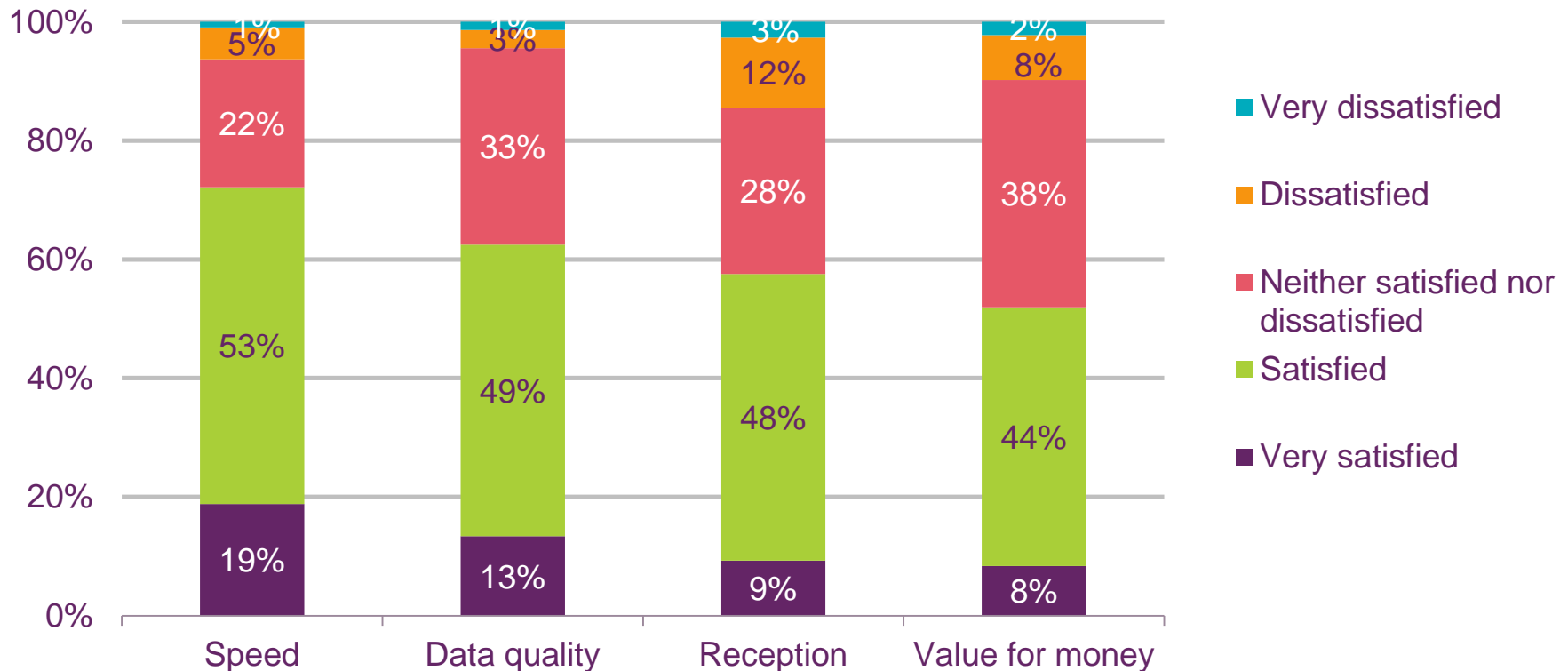
Source: Ofcom mobile broadband measurement fieldwork October to December 2014

Note: Speeds are the average (mean) of all 4G tests and all 3G tests.

## Figure 4.6

### Satisfaction levels with 4G compared to 3G, by category

% of respondents



Source: YouGov, 4G Tariffs 22-28 May 2015

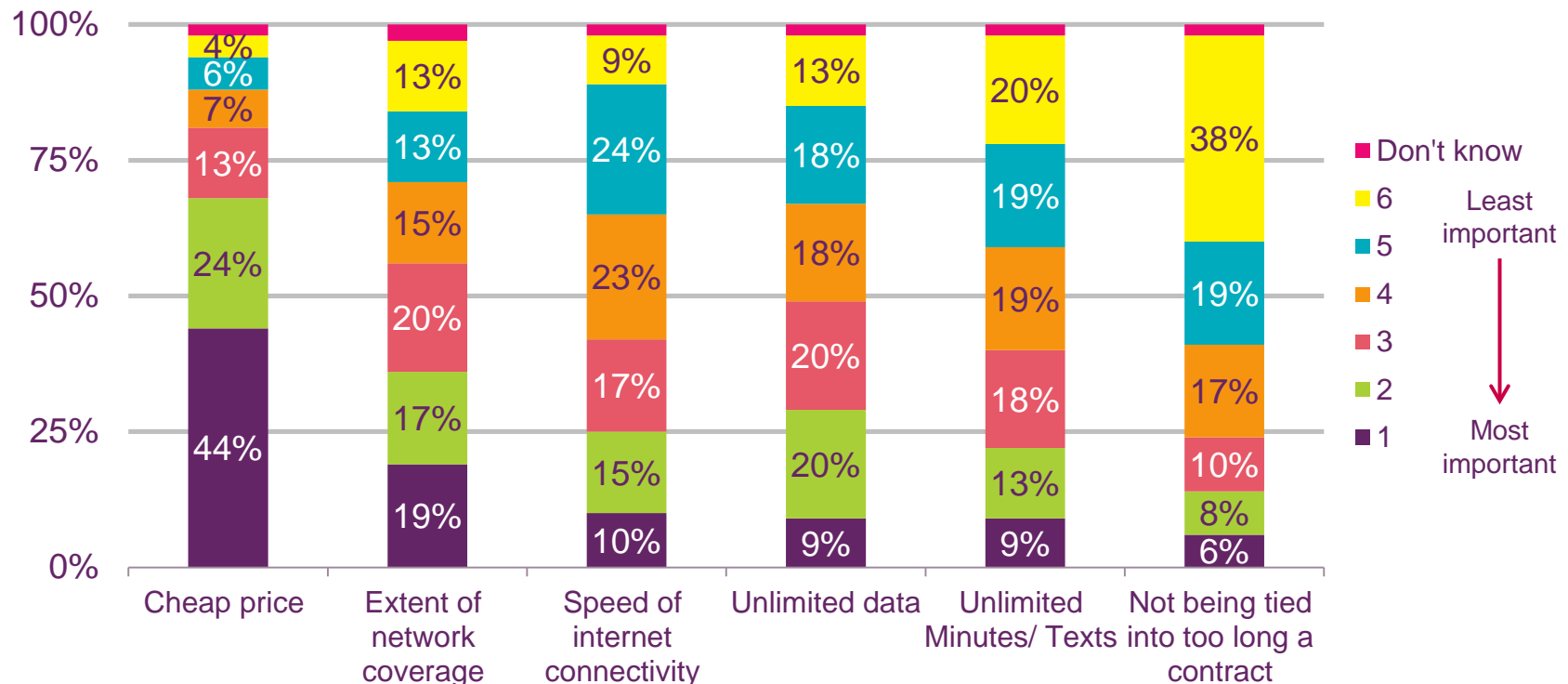
Base: Online UK adults 16+ who have upgraded from 3G to 4G (574)

q33\_1. How satisfied are you with your upgrade to 4G (compared with 3G), in terms of internet speed, quality of reception/coverage, data quality and value for money?

## Figure 4.7

### Importance of factors when deciding to take up a 4G plan

% of respondents



Source: YouGov, 4G Tariffs 22-28 May 2015

Base: Online UK adults 16+ who do not currently have 4G (388)

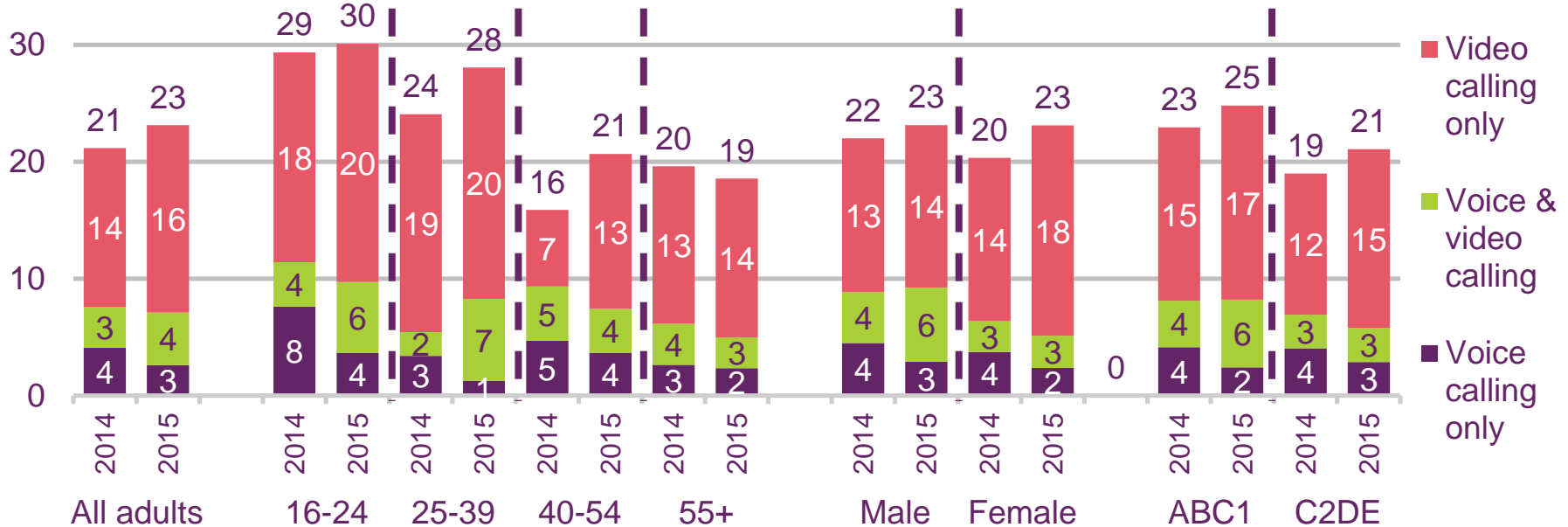
Q40. Which of these would be most important when deciding which 4G plan to take up? Please put in rank order of 1-6 where 1 = most important and 6 = least important.

# VoIP

# Figure 4.8

## Proportion of internet users regularly using VoIP services: 2014-2015

Proportion of internet users (%)



Source: YouGov VoIP 24-31 March 2015 and YouGov VoIP 1-6 May 2014

Base: Online UK adults 16+ 2015 (n = 2110) and 2014 (n = 1048)

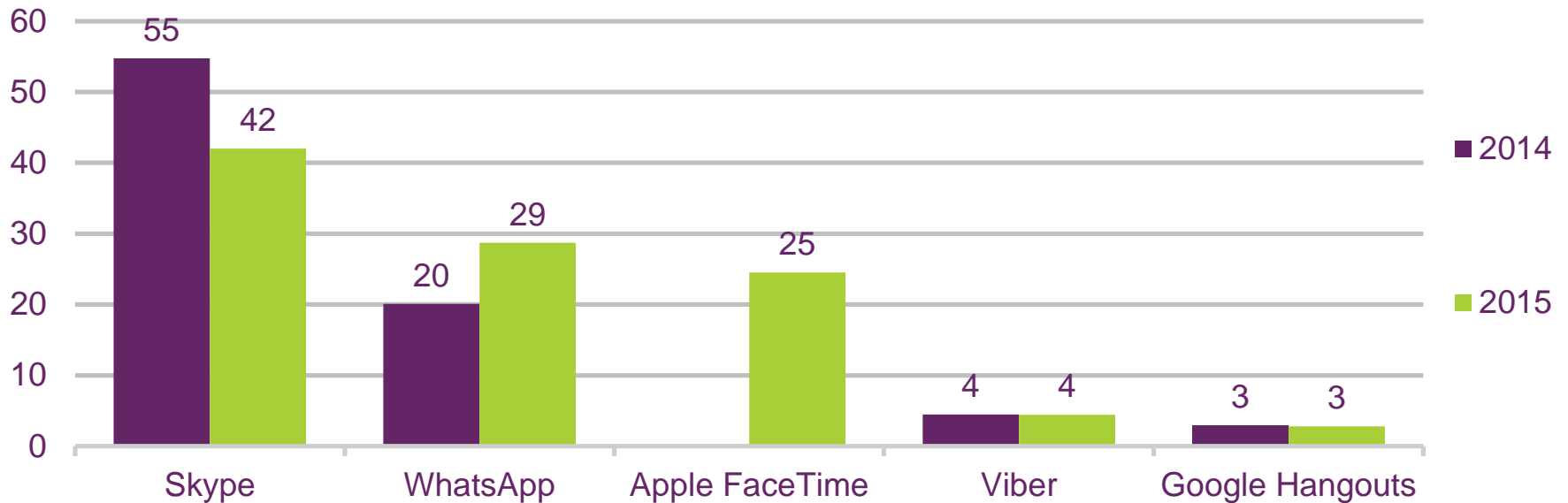
q1. Which of these, if any, do you use on a regular basis as a method of communication, for either business or personal use?

Note: Excludes those who only use VoIP to make voice calls on mobile handsets.

## Figure 4.9

### Use of VoIP providers: 2014-2015

Proportion of VoIP users (%)



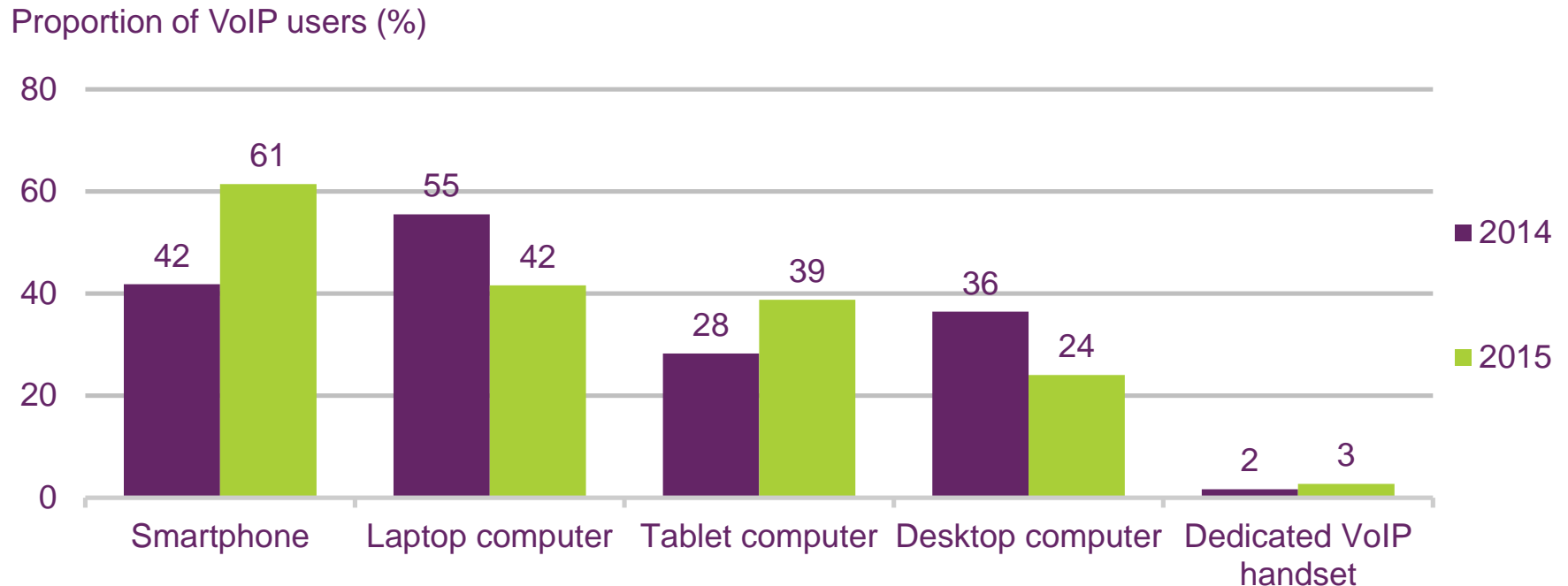
Source: YouGov VoIP 24-31 March 2015 and YouGov VoIP 1-6 May 2014

Base: Online UK current VoIP users 16+ 2015 (n = 1325), 2014 (n = 834)

Q5. And which of these, if any, do you currently use for making phone calls, video calls, instant messaging and/or faxing?

## Figure 4.10

### Devices used to make VoIP calls: 2014-2015



Source: YouGov VoIP 24-31 March 2015 and YouGov VoIP 1-6 May 2014

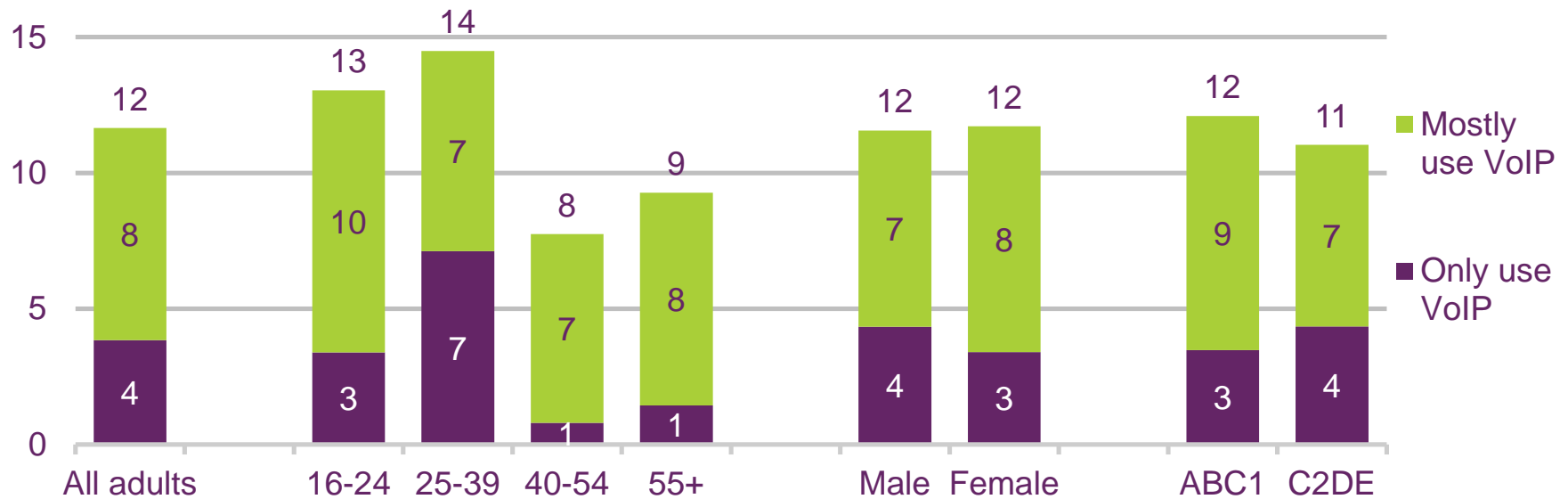
Base: Online UK VoIP users 16+ 2015 (n = 1008), 2014 (n = 398)

q6. On which of the following devices do you use VoIP services, whether for making phone calls, video calls, instant messaging and/or faxing?

# Figure 4.11

## Use of voice services on mobile phones: 2015

Proportion of respondents using VoIP on a mobile phone (%)



Source: YouGov VoIP 24-31 March 2015

Base: Online UK adults who use VoIP on their smartphone 16+ (617), 16-24 (118), 25-39 (181), 40-54 (175), 55+ (143), male (258), female (359), ABC1 (343) and C2DE (274)

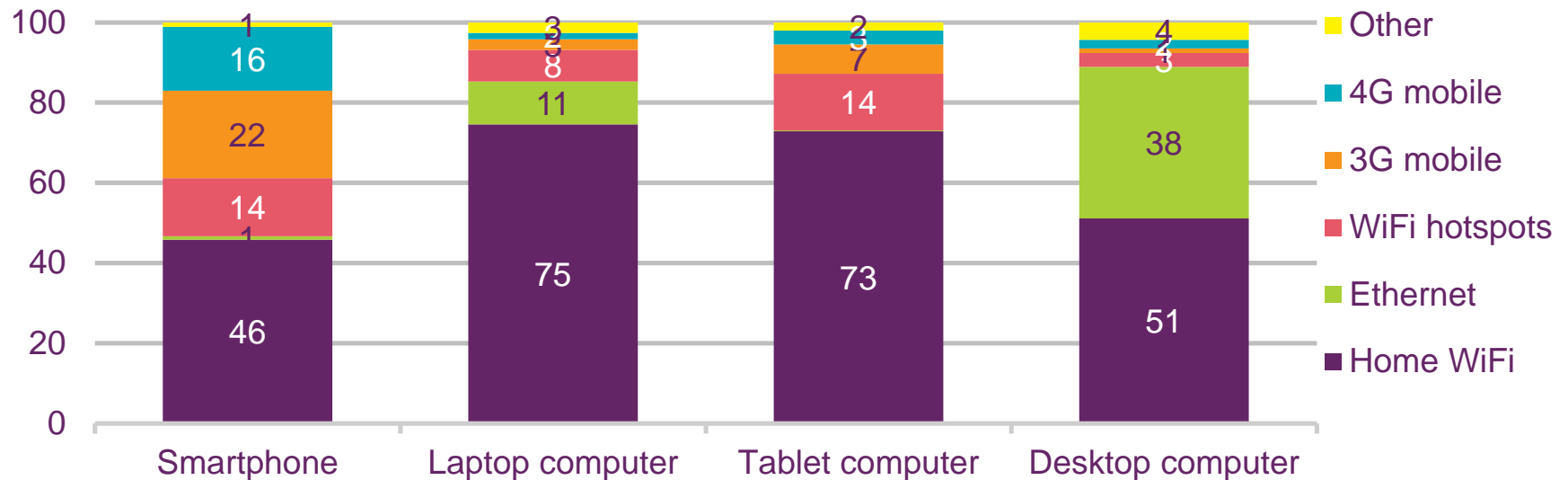
Q7. You've stated that you use VoIP on your smartphone and/or feature phone. Thinking specifically about voice calls (i.e. not using video), which of the following best describes your use?



## Figure 4.12

### Network used to connect to VoIP services, by device type: 2015

Proportion of mentions (%)



Source: YouGov VoIP 24-31 March 2015

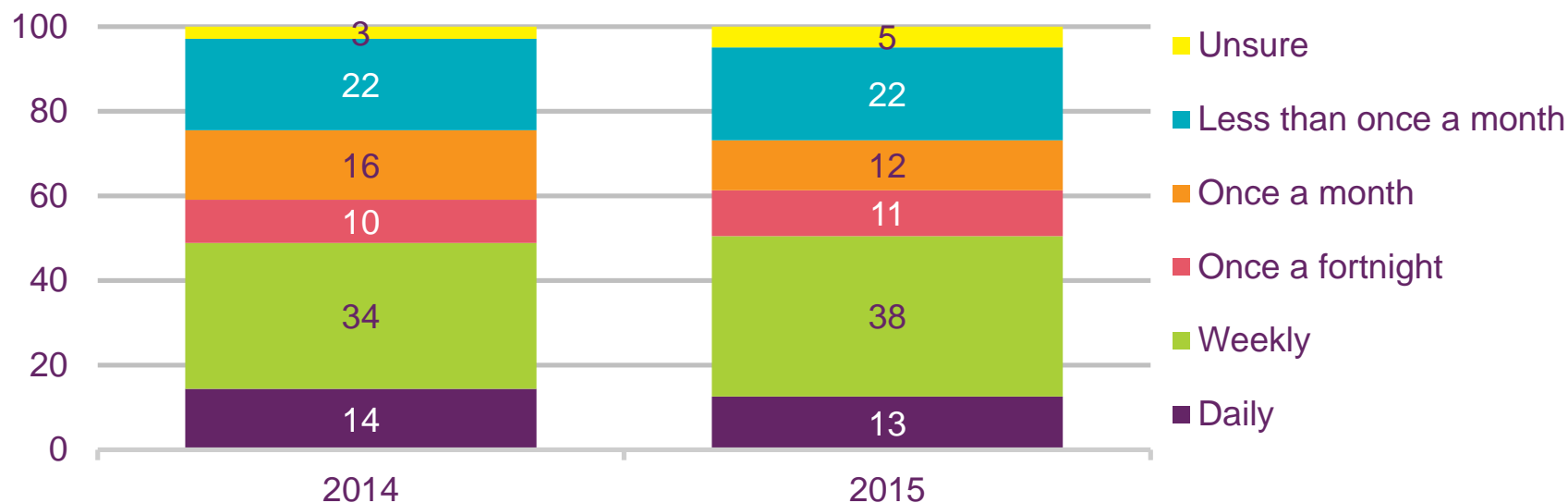
Base: Online UK adults who use VoIP 16+ (1008)

Q8. And how do you connect to VoIP from the device/s you use?

## Figure 4.13

### Frequency of VoIP use: 2014-2015

Proportion of VoIP users (%)



Source: YouGov VoIP 24-31 March 2015 and YouGov VoIP 1-6 May 2014

Base: Online UK adults who use VoIP 16+ 2015 (1008) and 2014 (398)

Q15. Which of the following best describes how frequently you use VoIP services?

## Figure 4.14

### Advantages of VoIP

Proportion of mentions (%)



Source: YouGov VoIP 24-31 March 2015

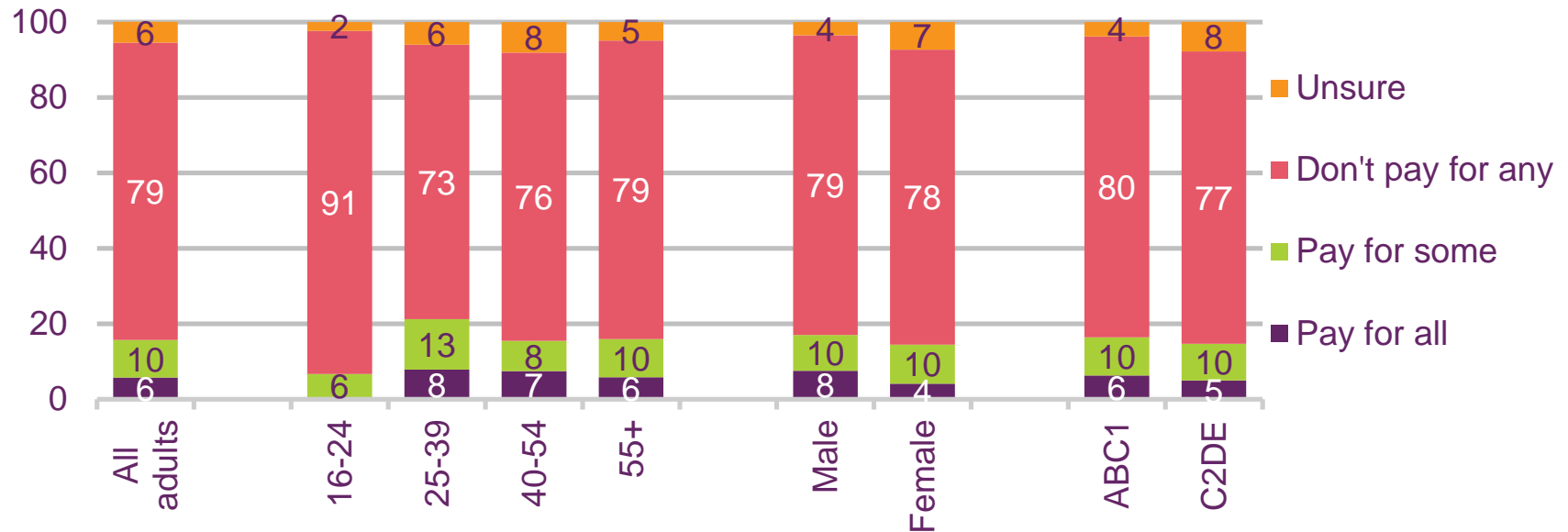
Base: Online UK adults who use VoIP 16+ 2015 (1008)

Q22. Which of these, if any, do you feel are advantages of using VoIP over traditional methods of calling?

# Figure 4.15

## Paying for VoIP services: 2015

Proportion of VoIP users (%)



Source: YouGov VoIP 24-31 March 2015

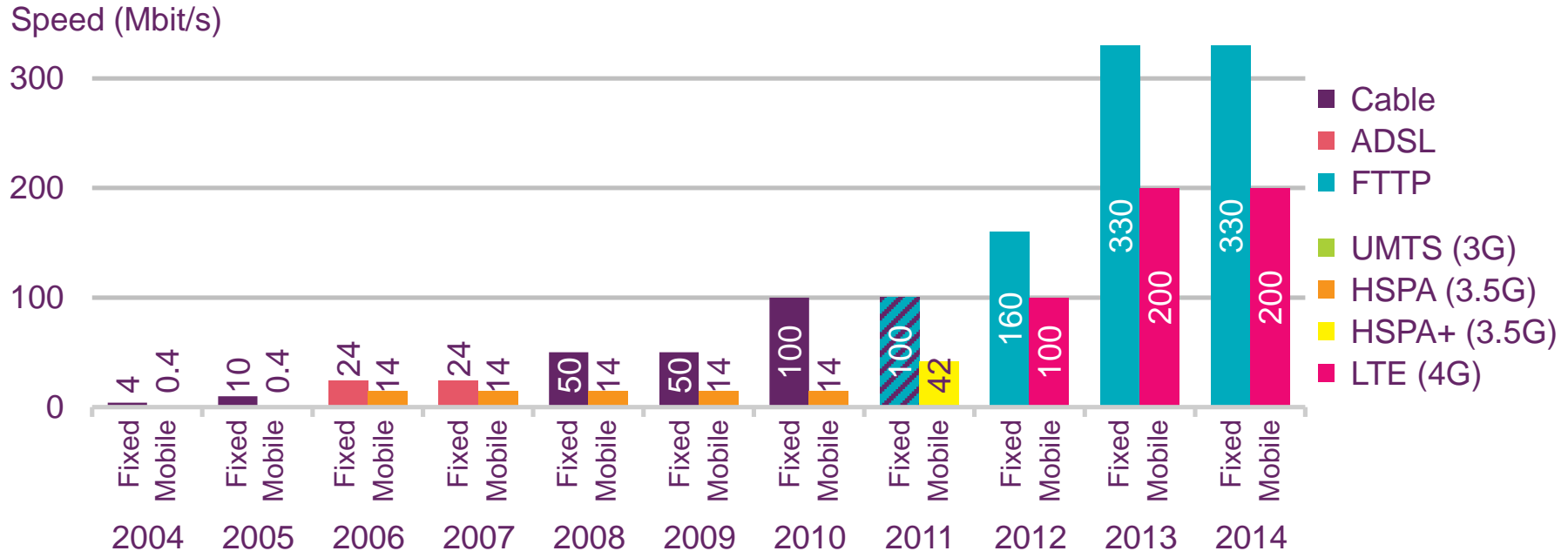
Base: Online UK adults who use VoIP 16+ 2015 (1008)

Q17. Do you pay for any of the VoIP service/s you use?

# Take-up and use of fixed and mobile broadband services

## Figure 4.16

Development of UK maximum available headline fixed broadband and theoretical mobile data speeds: 2004-2014



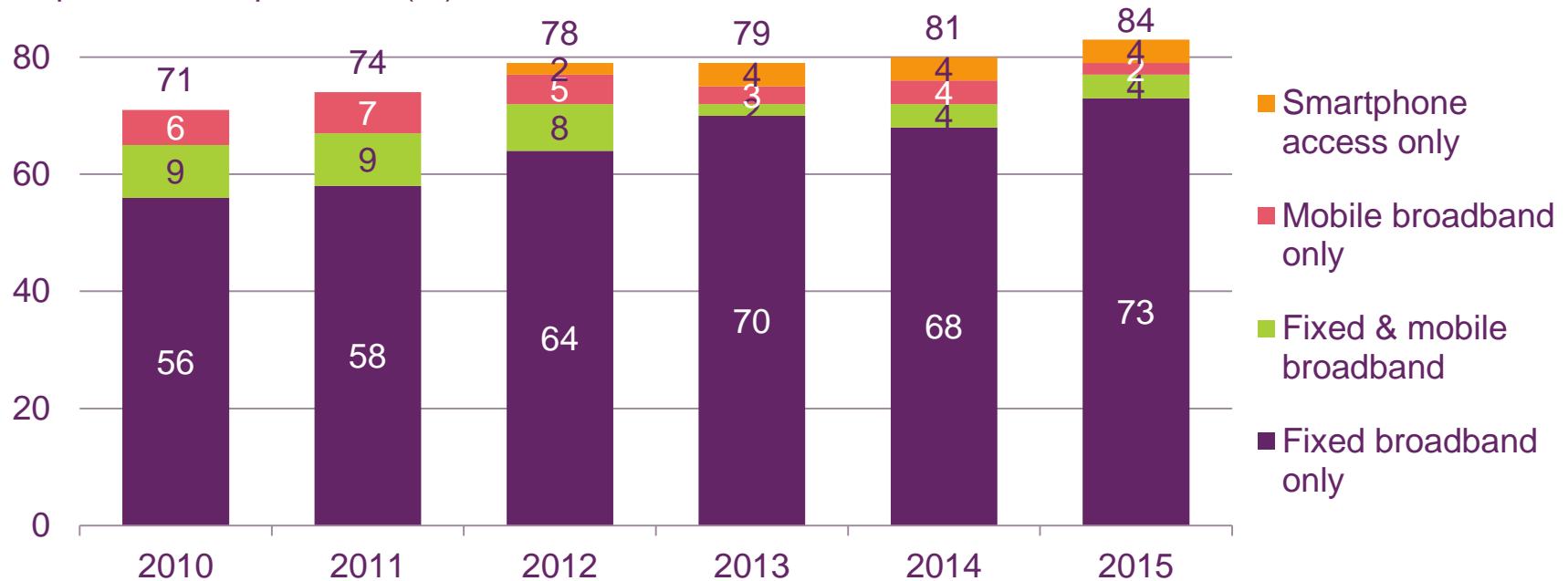
Source Ofcom

Note: Mobile figures are the theoretical maximums offered by the deployed technologies.

# Figure 4.17

## Cross-ownership of fixed and mobile broadband: 2010-2015

Proportion of respondents (%)



Source: Ofcom Technology Tracker. Data from Q1 of each year 2009-2013, then wave 1 2014-2015

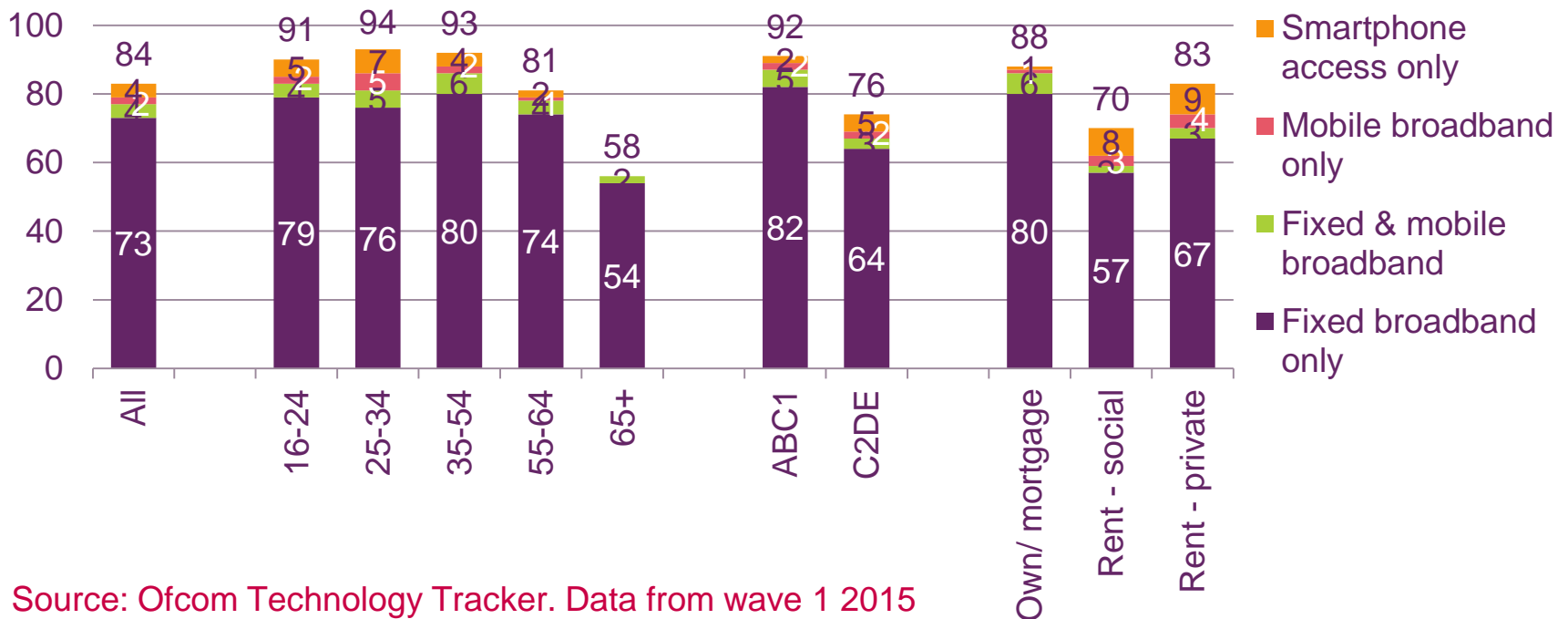
Note: Mobile broadband excludes data use on a smartphone handset; smartphone access-only data are not available prior to 2012

Base: All adults aged 16+ (6090 in 2009, 9013 in 2010, 3474 in 2011, 3772 in 2012, 3750 in 2013, 3740 in 2014, 3756 in 2015)

## Figure 4.18

### Cross-ownership of fixed and mobile broadband services, by age, socio-economic group and housing type

Proportion of respondents (%)



Source: Ofcom Technology Tracker. Data from wave 1 2015

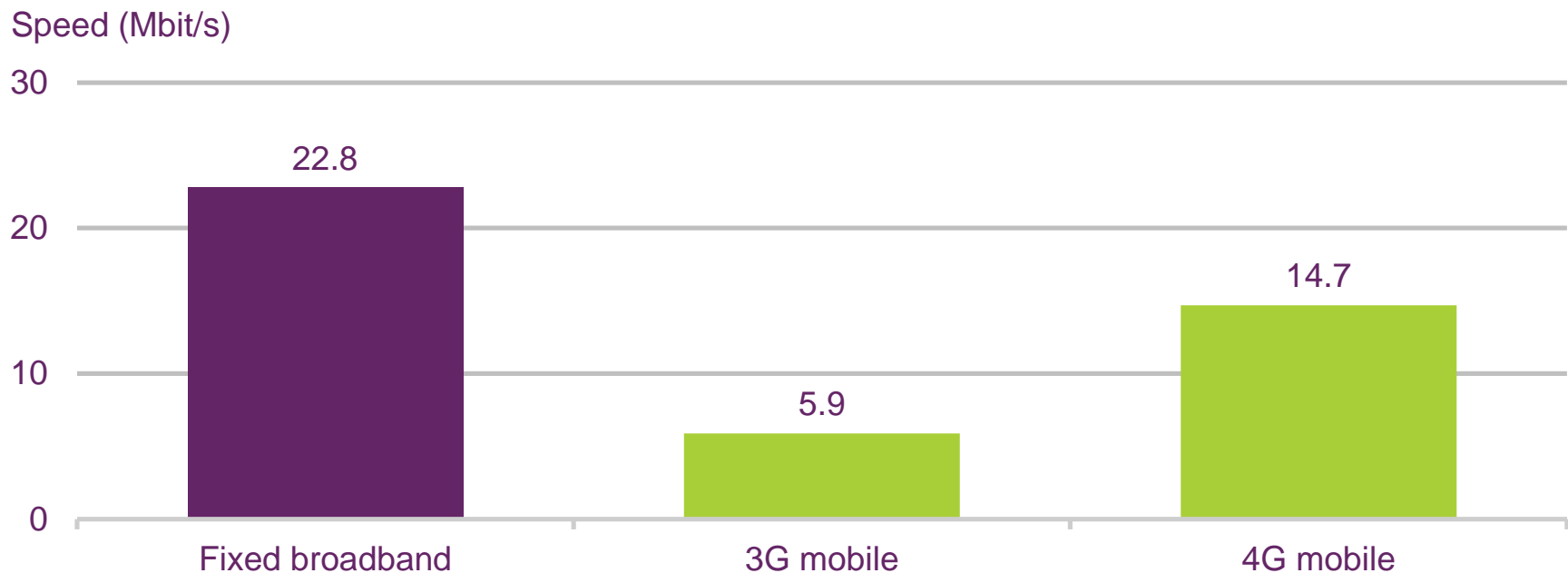
Note: Mobile broadband excludes data use on a smartphone handset

Base: All adults aged 16+ (3756), aged 16-24 (514), aged 25-34 (606), aged 35-54 (1189), aged 55-64 (586), aged 65+ (861), ABC1 (1948), C2DE (1807), Own/ mortgage home (2224), Rent home – social (869), Rent home – private (505).



## Figure 4.19

### Average actual fixed and mobile data speeds: H2 2014



Source Ofcom: UK fixed-line broadband performance, November 2014

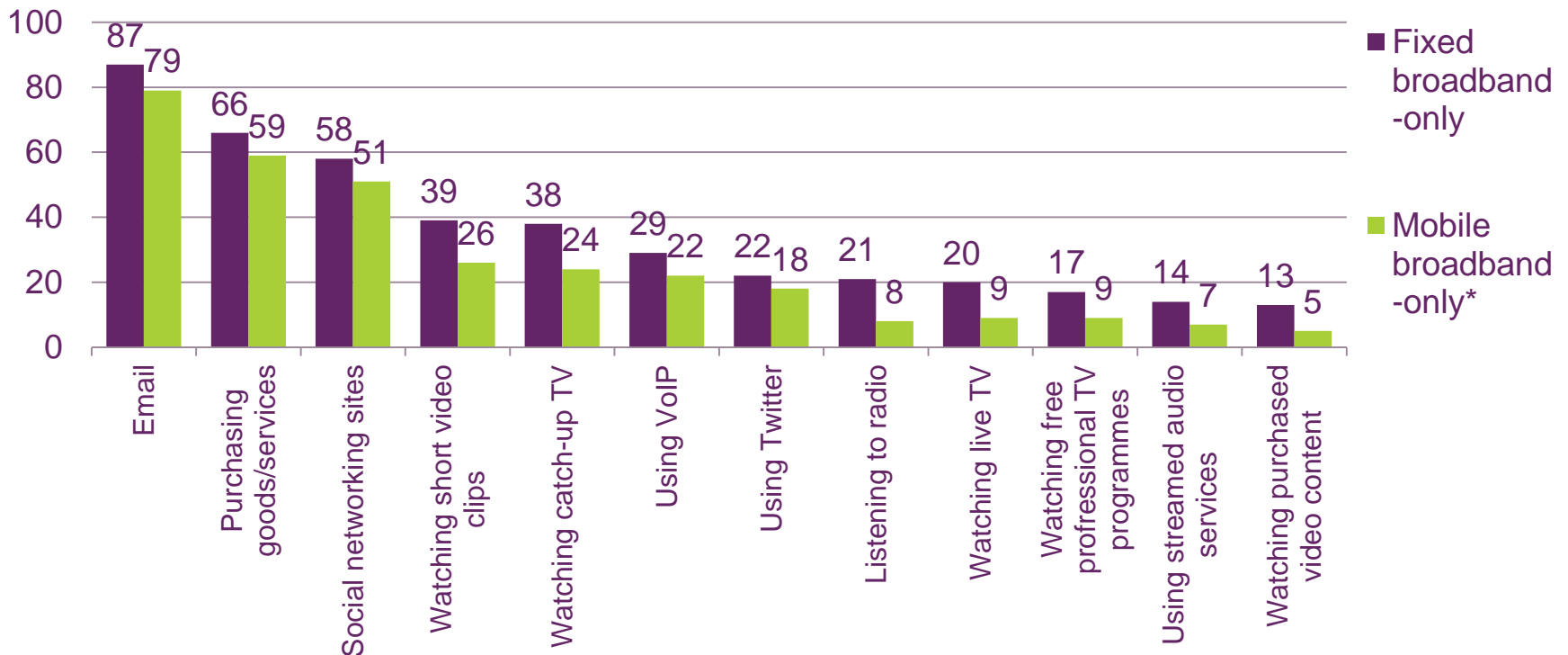
(<http://stakeholders.ofcom.org.uk/market-data-research/other/telecoms-research/broadband-speeds/broadband-speeds-november2014/>)

and Measuring mobile broadband performance in the UK  
(<http://stakeholders.ofcom.org.uk/market-data-research/other/telecoms-research/broadband-speeds/mobile-bb-april-15/>)

## Figure 4.20

### Use of online activities among fixed-only and mobile-only broadband users

Proportion of respondents (%)



Source: Ofcom Technology Tracker, wave 1 2015

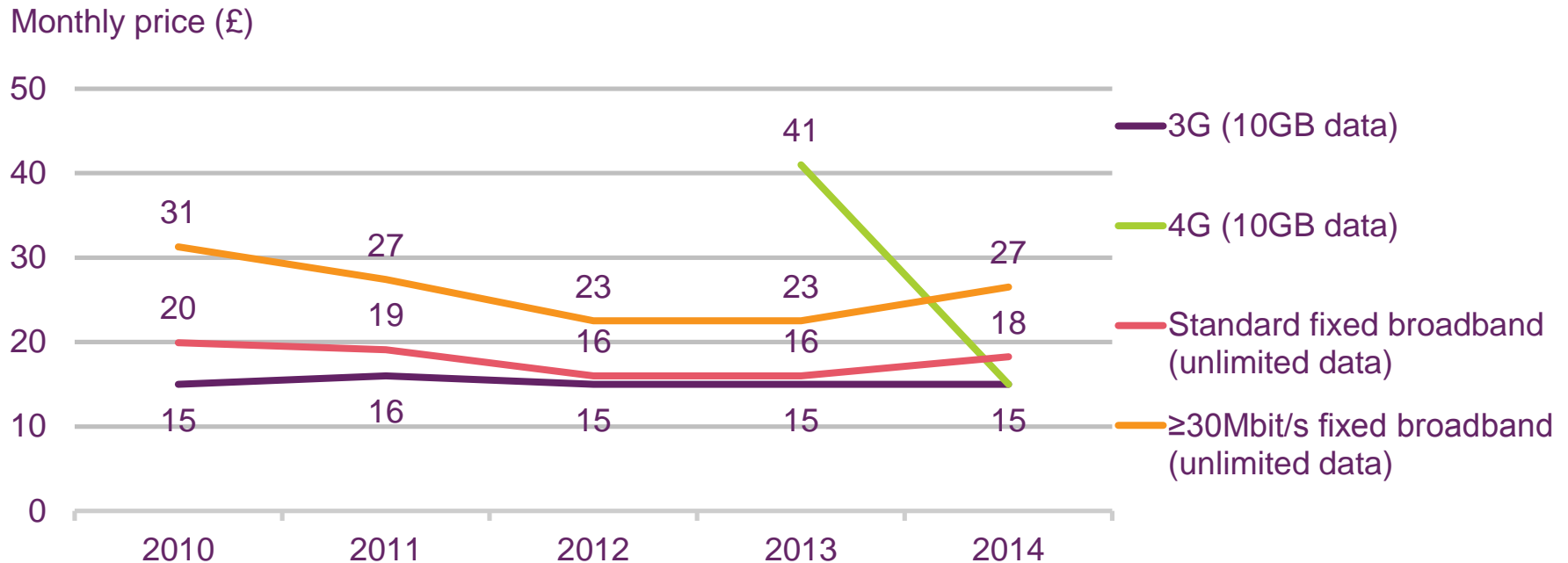
Base: All adults who only use fixed broadband (2519), all adults who only use mobile broadband (75)

Note: \*Caution: base between 50 and 100 therefore results are indicative only

QE20 (QE5A) Which, if any, of these do you use the internet for?

## Figure 4.21

### Lowest available residential fixed and mobile pricing: 2010-2014



Source: Ofcom / Teligen, data from July of each year

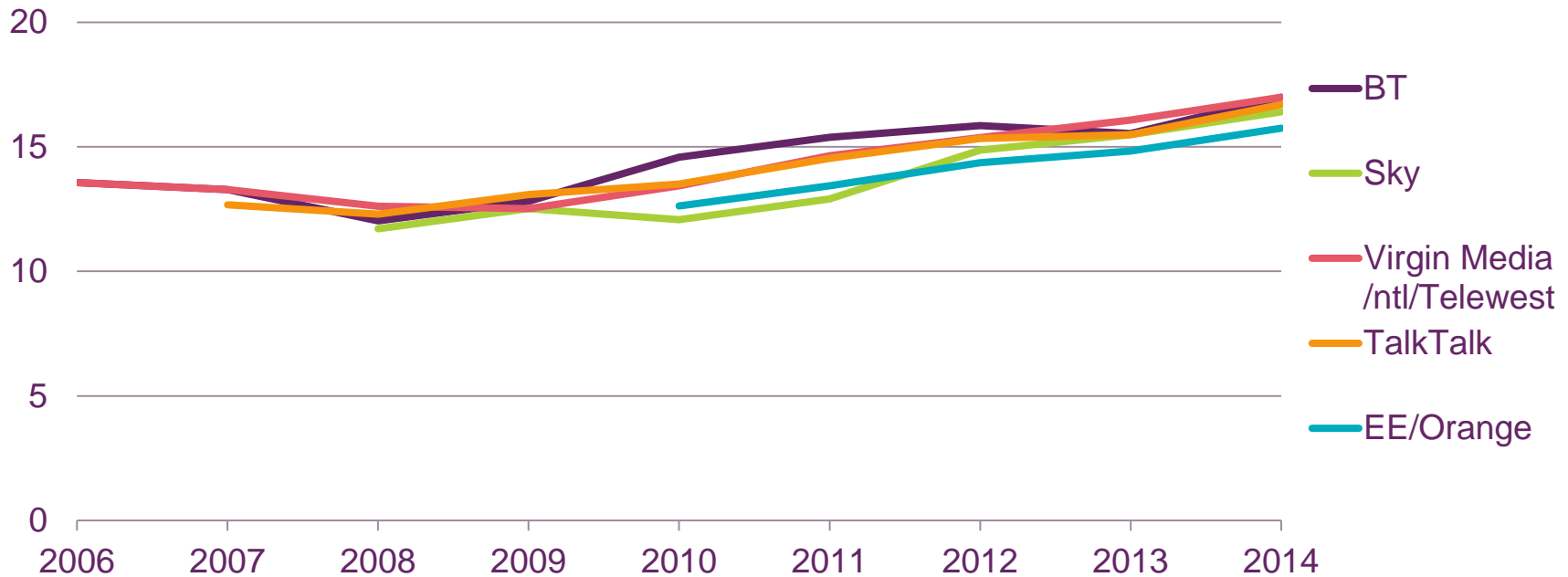
Note: Fixed broadband includes line rental where this is required; the price of a 4G service in 2013 related to an 8GB service with an additional 2GB data bolt-on.

# Fixed voice tariff re-balancing and stand-alone landline households

## Figure 4.22

### Residential line rental prices: 2006-2014

£ per month (Dec 2014 prices)



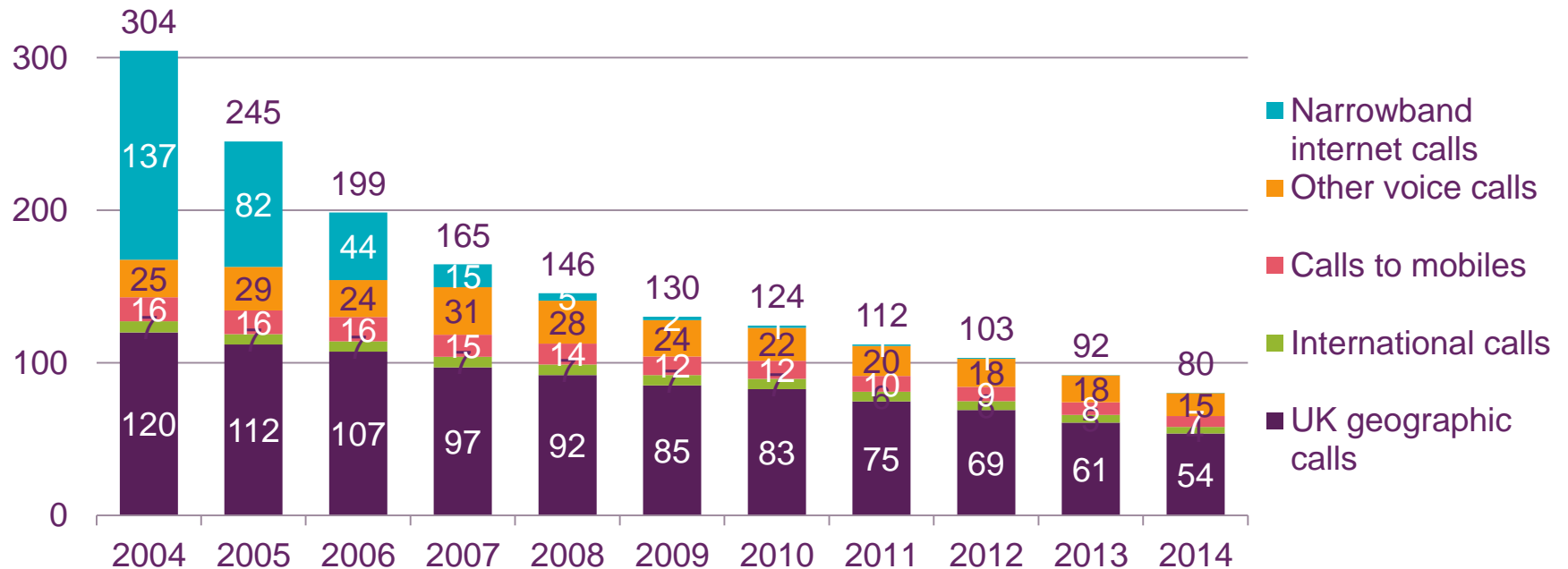
Source: Ofcom / Pure Pricing UK broadband pricing briefings

Note: Prices as at December of each year; adjusted for CPI; excludes line rental saver pre-payment tariffs.

# Figure 4.23

## Fixed-line call volumes, by type of call

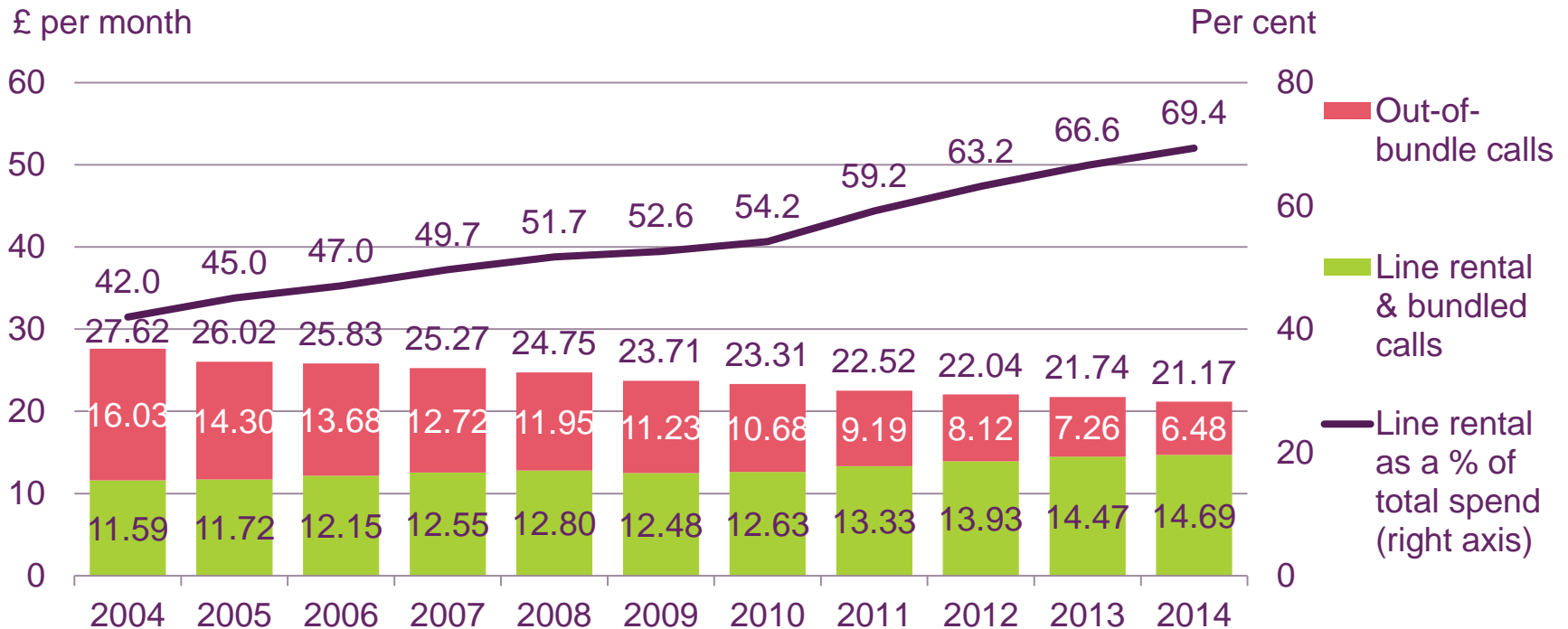
Billions of minutes



Source: Ofcom/operator data

# Figure 4.24

## Average monthly retail revenue per fixed line

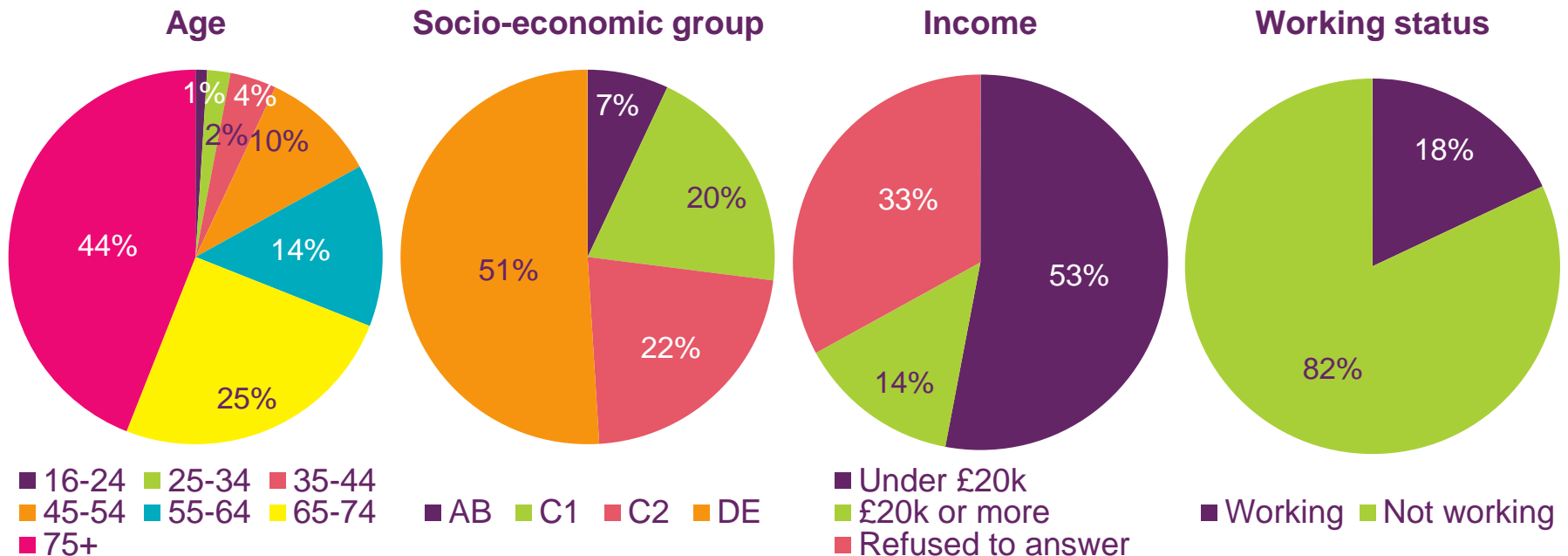


Source: Ofcom/operator data

Note: Excludes VAT.

# Figure 4.25

## Split of fixed-only homes, by demographic



Source: Kantar Media Omnibus.

Base: All landline-only customers with sole/joint responsibility for paying the bill (241)

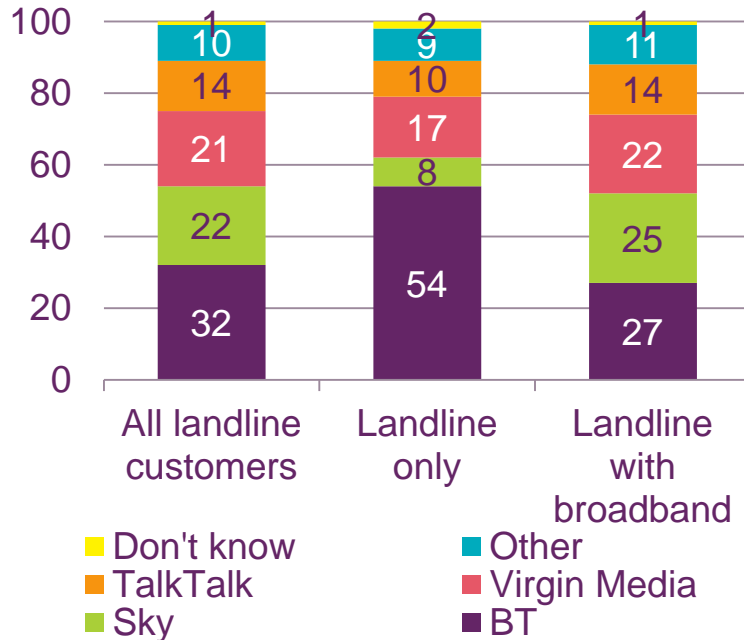


# Figure 4.26

## Awareness and use of alternative providers: landline-only customers

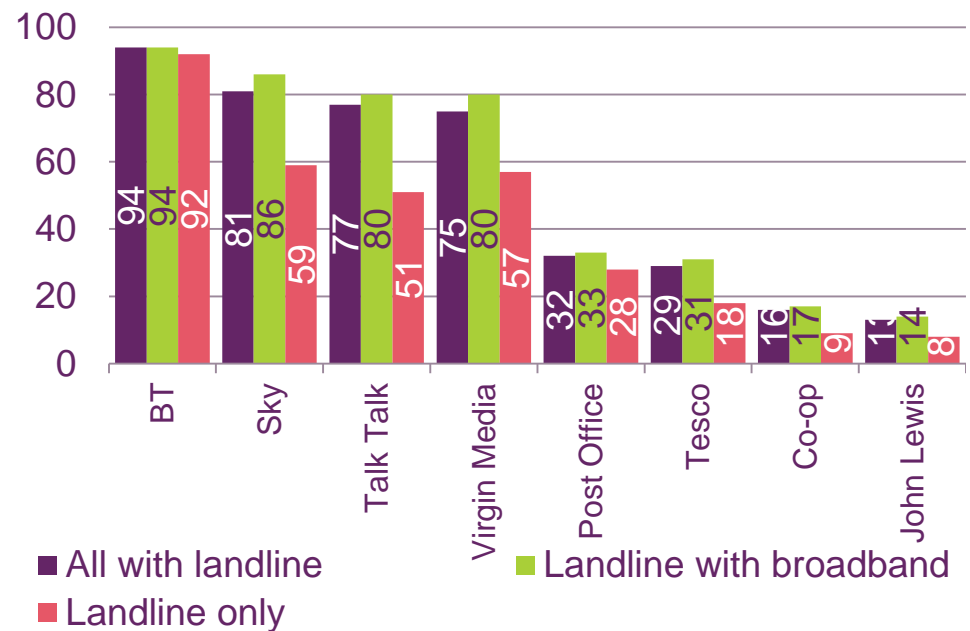
### Current landline provider

Proportion of respondents (per cent)



### Awareness of fixed voice providers

Proportion of respondents (per cent)



Source: Kantar Media Omnibus.

Base: All landline customers (with sole/ joint responsibility for paying the bill) (1095); Landline only (241); Landline with fixed broadband (826)

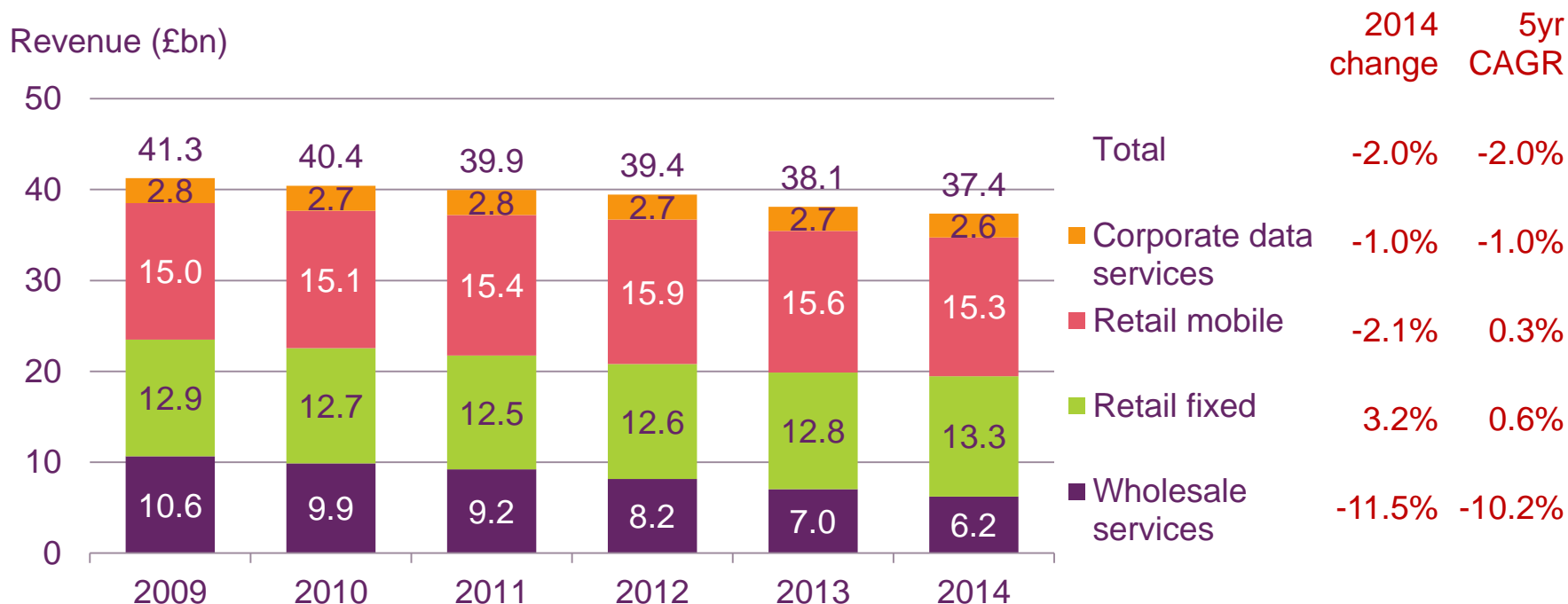
Q5A. Which provider do you use for your landline service? Q11. Before today, which of the following

companies were you aware it is possible to get a landline service from?

## Industry section

# Figure 4.27

## Summary of UK telecoms revenues



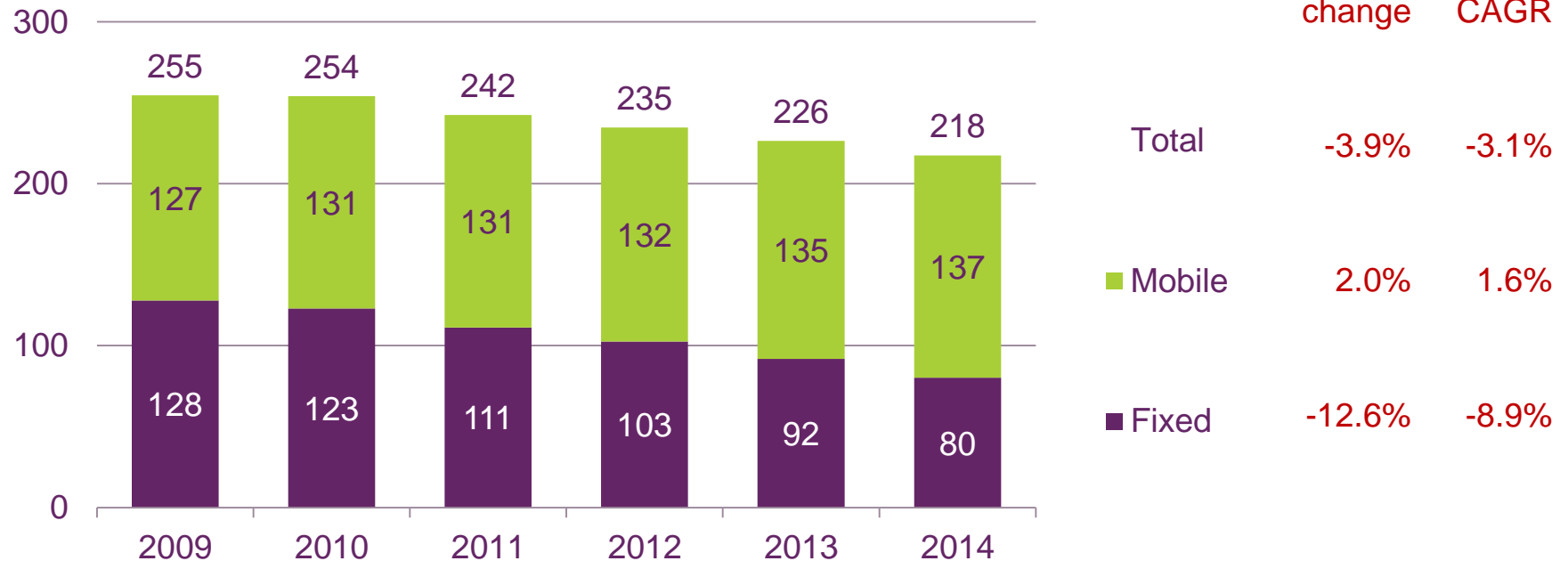
Source: Ofcom / operators, with the exception of corporate data services, which sourced from IDC.

Notes: 'Corporate data services' comprises web hosting, Ethernet, IP VPN, digital leased line, corporate VoIP and frame relay/ATM services; wholesale mobile comprises wholesale mobile voice, messaging and data services, mobile voice and SMS termination revenue and wholesale inbound roaming revenue (i.e. - revenue from overseas operators when their subscribers use UK networks).

# Figure 4.28

## Outgoing fixed and mobile voice call volumes

Billions of minutes

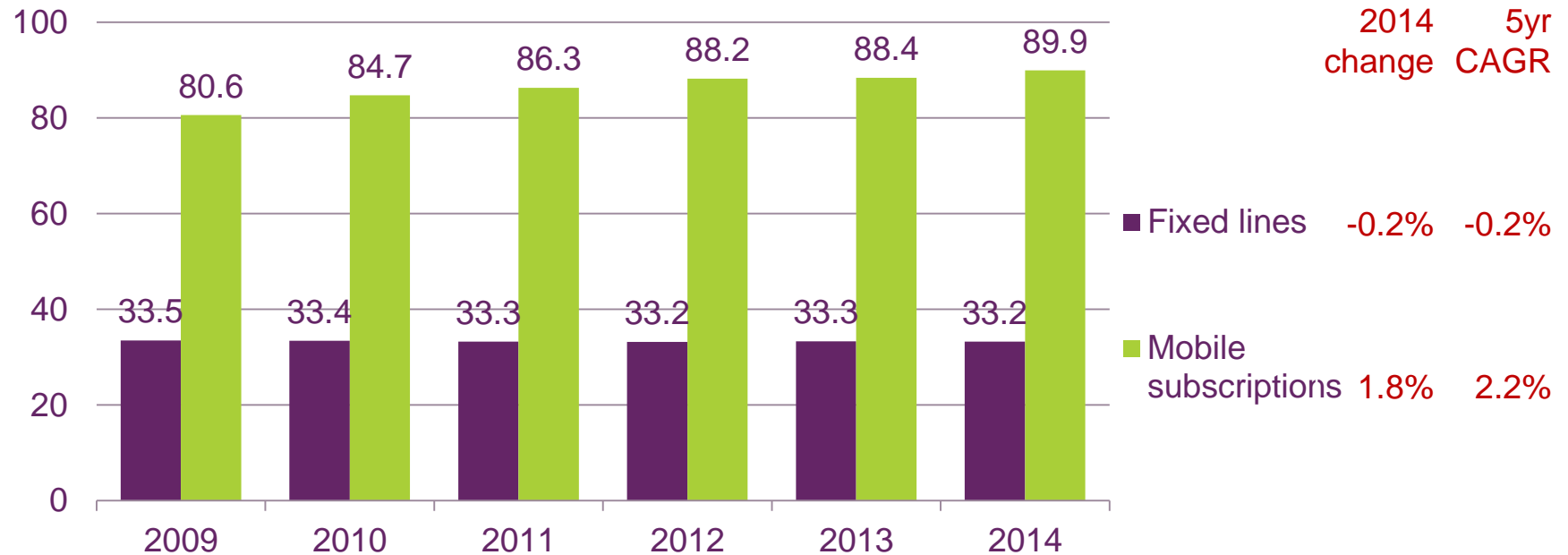


Source: Ofcom / operators

# Figure 4.29

## Fixed lines and mobile subscriptions

Millions

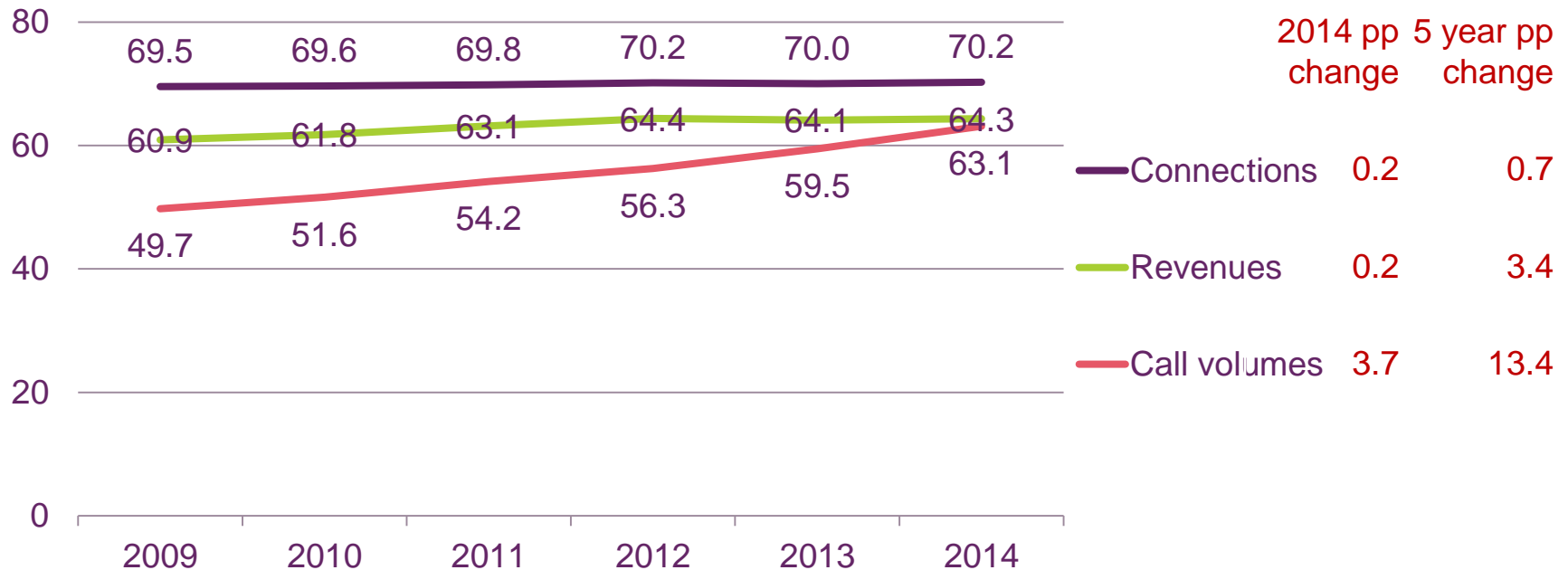


Source: Ofcom / operators

# Figure 4.30

## Mobile share of voice connections, revenues and volumes

Per cent



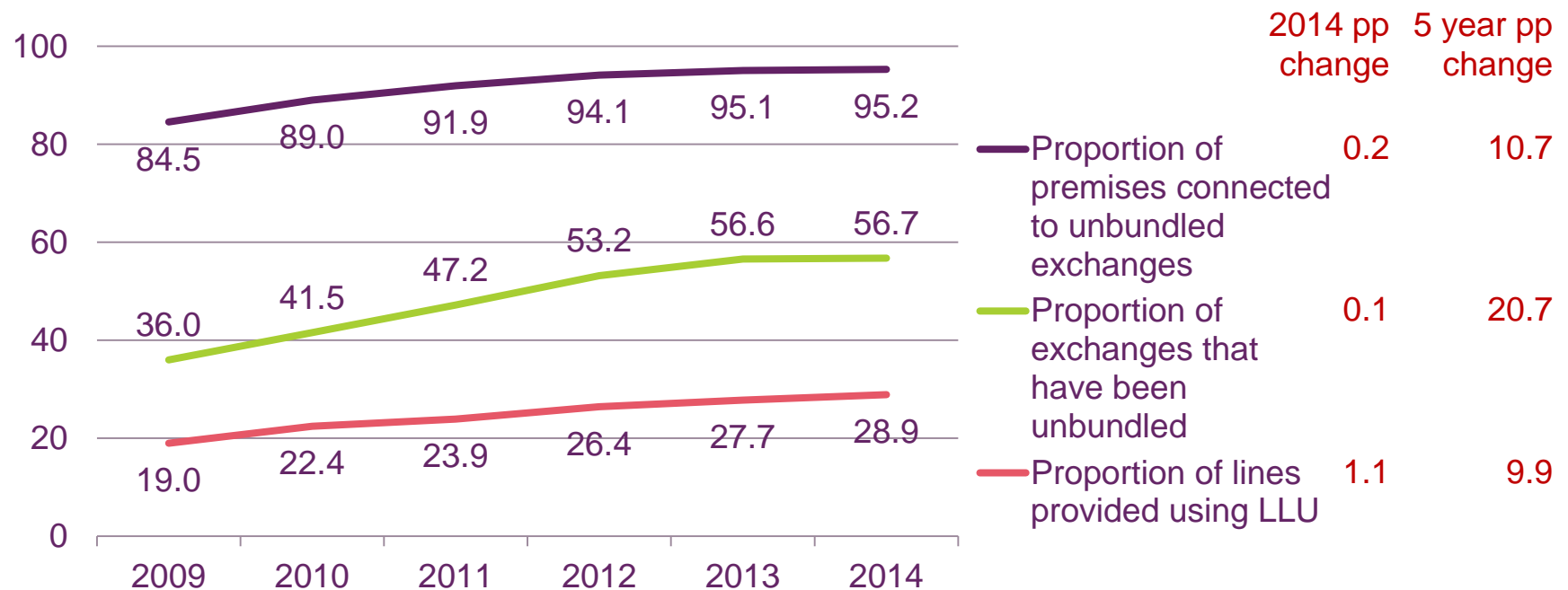
Source: Ofcom/operator data

Note: Mobile voice revenues will be overstated as they include revenues from bundled messaging and data services.

# Figure 4.31

## Unbundled BT local exchanges and connected premises

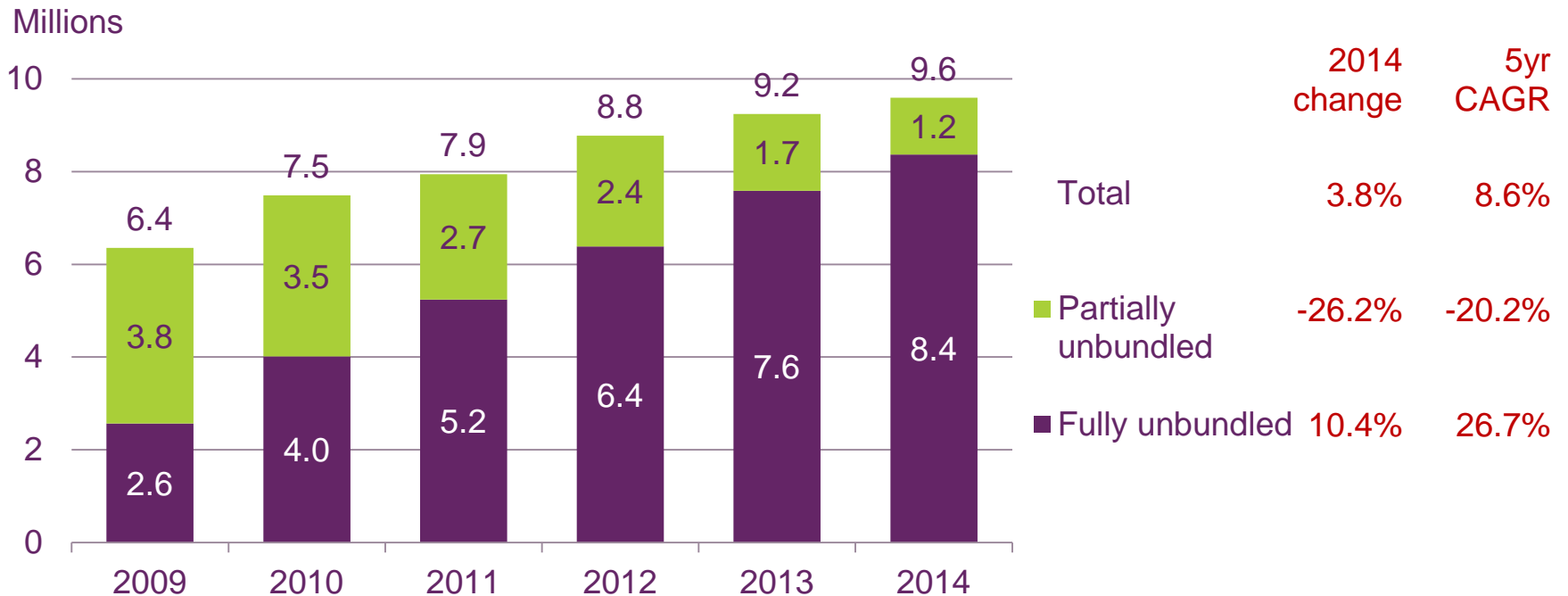
Per cent



Source: Ofcom / BT

# Figure 4.32

## Unbundled fixed lines



Source: BT

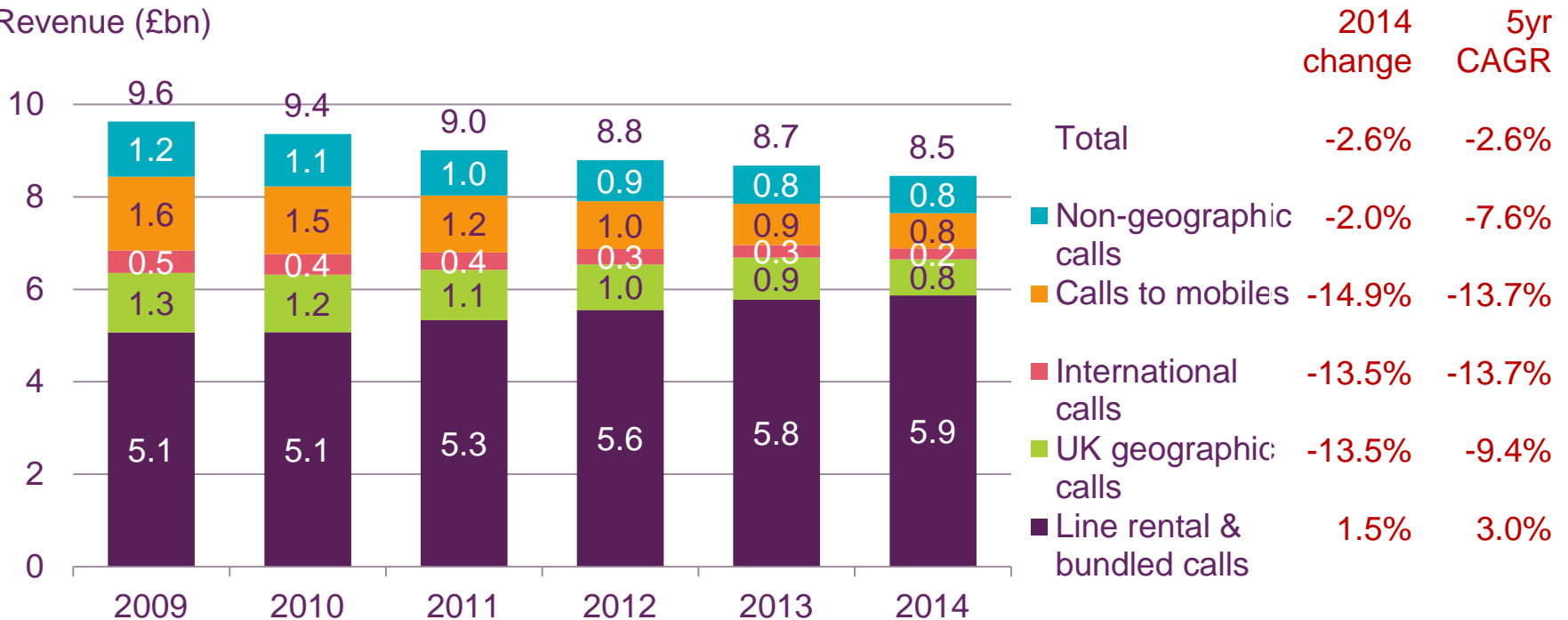


# Fixed voice services

# Figure 4.33

## Retail fixed voice revenues

Revenue (£bn)

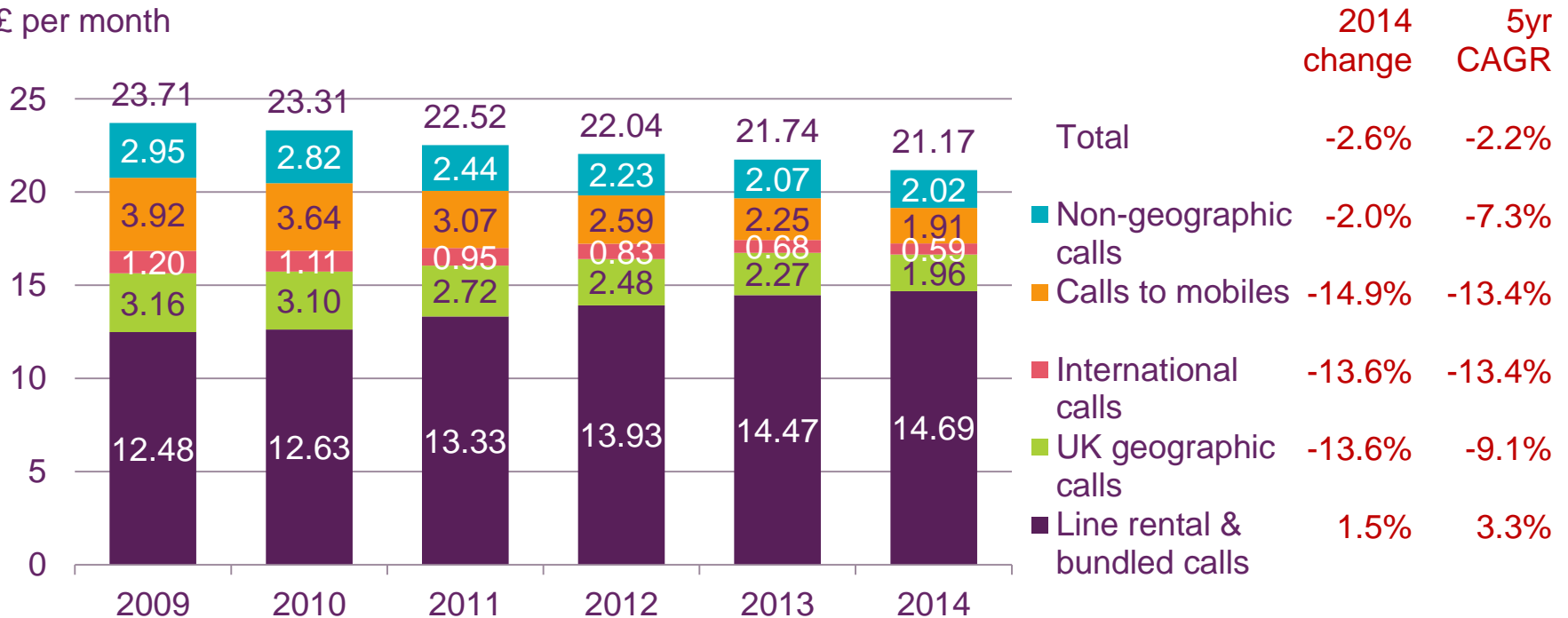


Source: Ofcom / operators

# Figure 4.34

## Average monthly retail voice revenue per fixed line

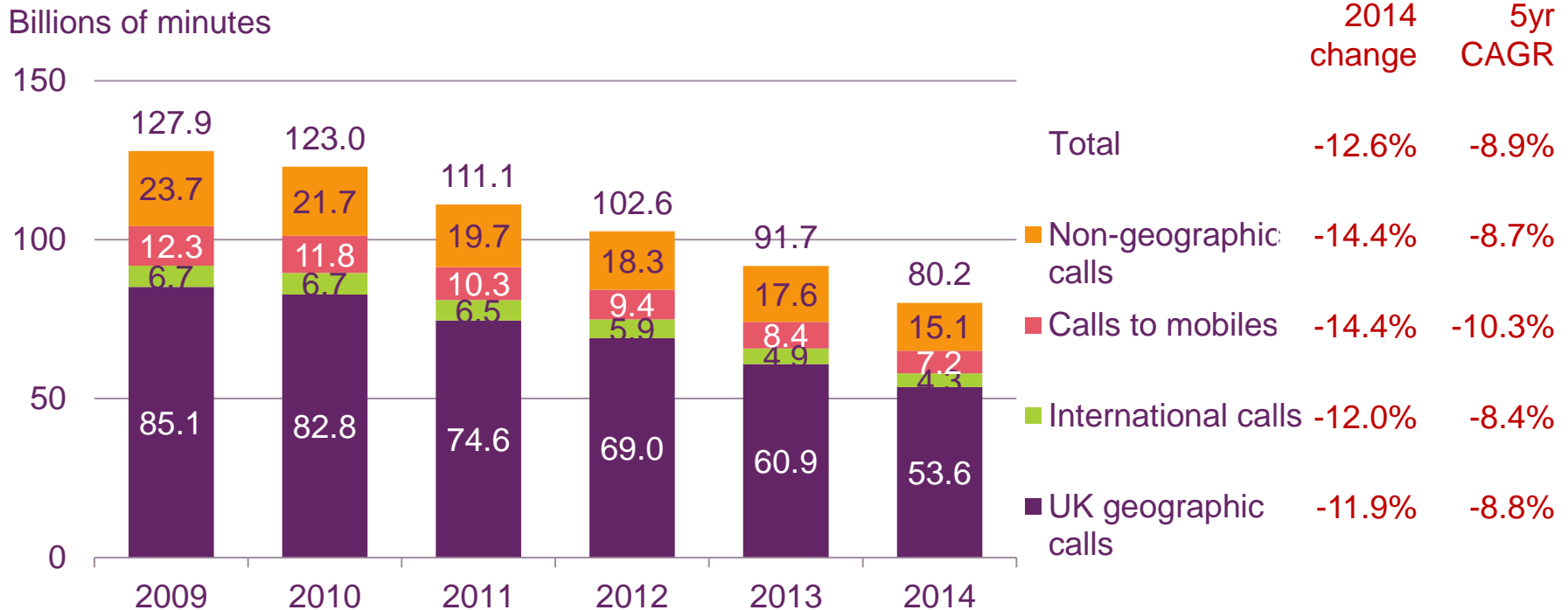
£ per month



Source: Ofcom / operators

# Figure 4.35

## Fixed voice call volumes, by type of call

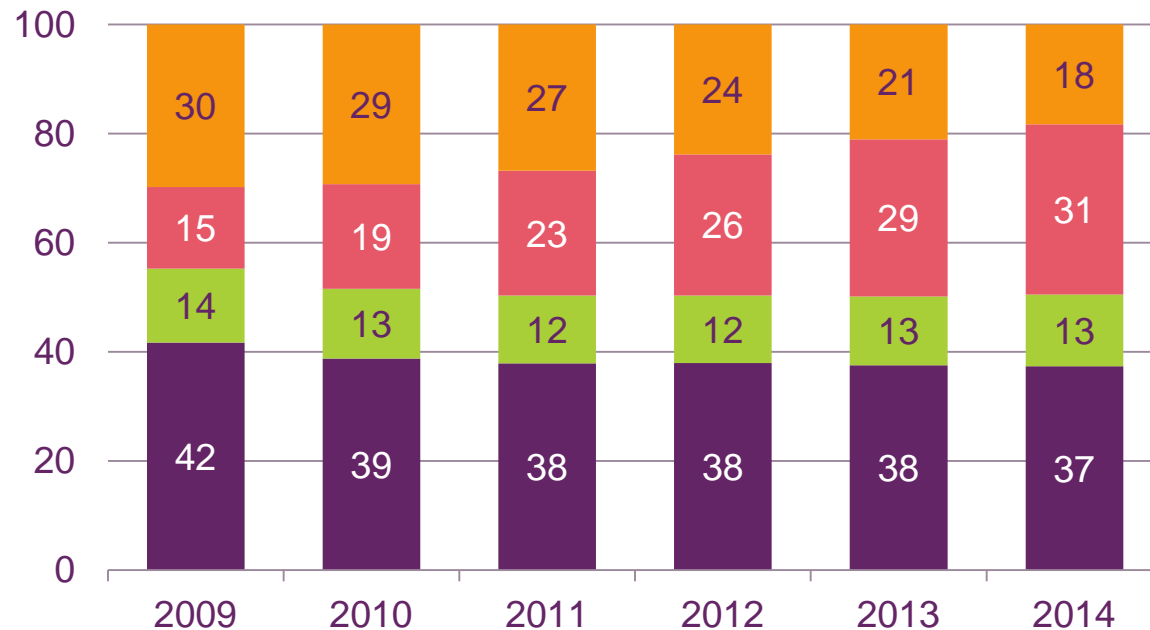


Source: Ofcom / operators

# Figure 4.36

## Share of retail fixed voice call volumes

Market share (per cent)



	2014 pp change	5 year pp change
Other indirect operators	-2.7	-11.5
Other direct operators	2.3	16.2
Virgin Media	0.6	-0.4
BT	-0.2	-4.3

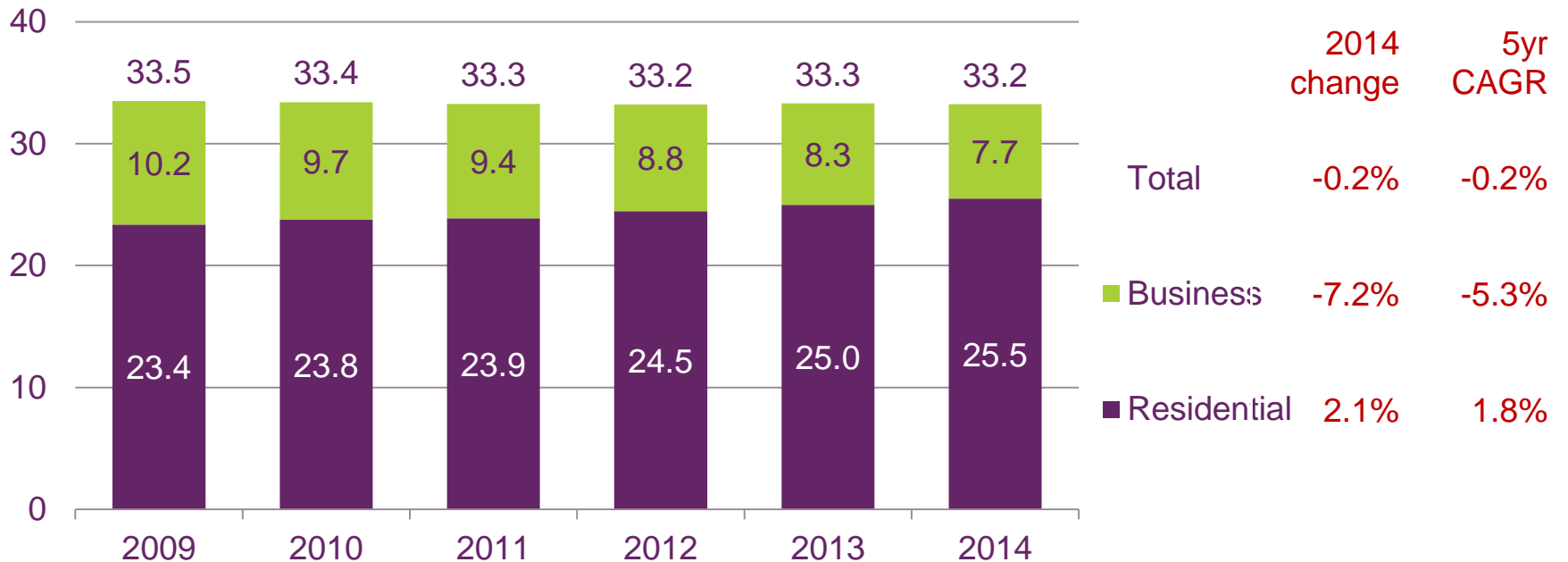
Source: Ofcom / operators

Note: Excludes non-geographic voice calls.

# Figure 4.37

## Number of fixed lines

Millions



Source: Ofcom / operators

# Fixed data services

# Figure 4.38

## Retail residential and SME fixed internet revenues

£billions



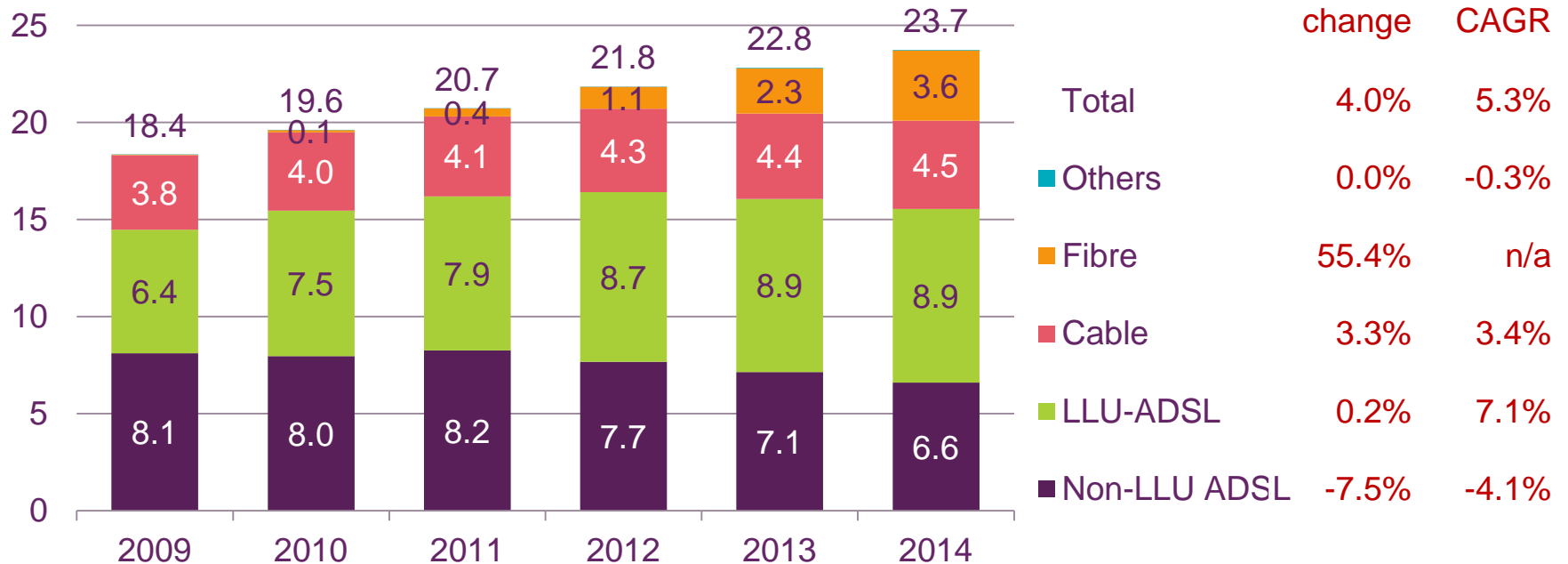
Source: Ofcom / operator data



# Figure 4.39

## Retail fixed broadband lines

Millions

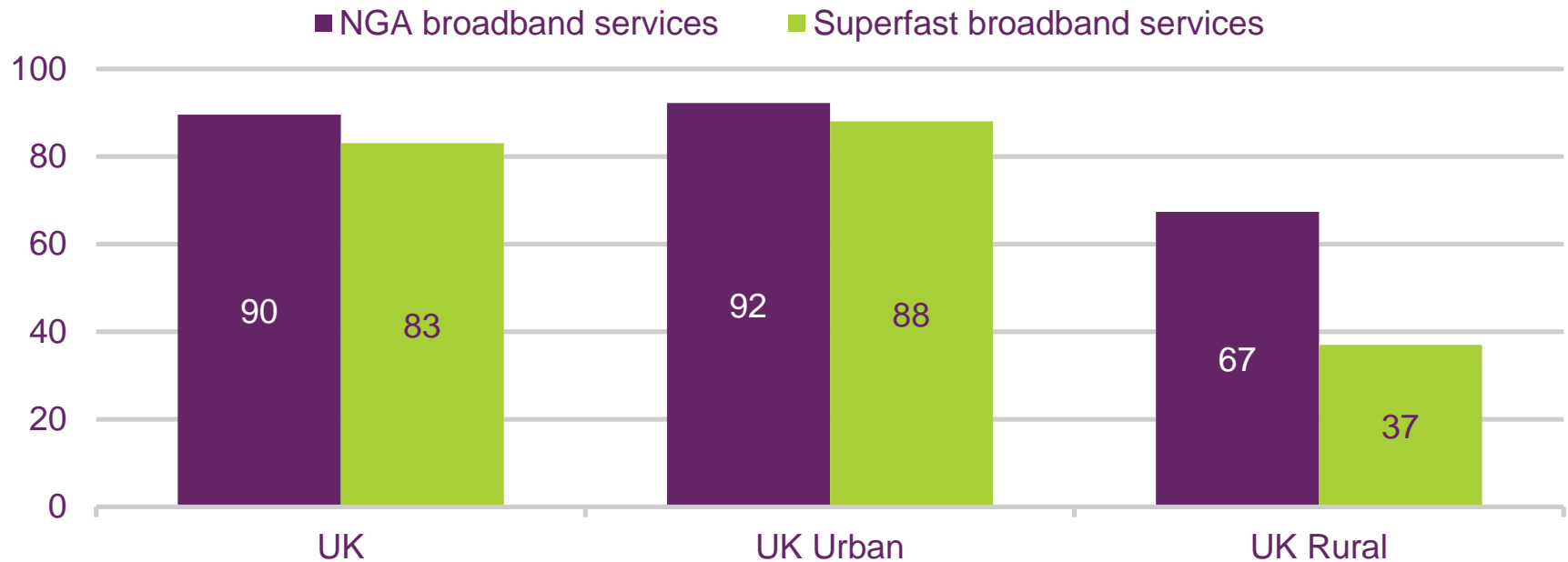


Source: Ofcom / operator data

## Figure 4.40

### Premises able to receive NGA and superfast broadband services

Proportion of premises (per cent)

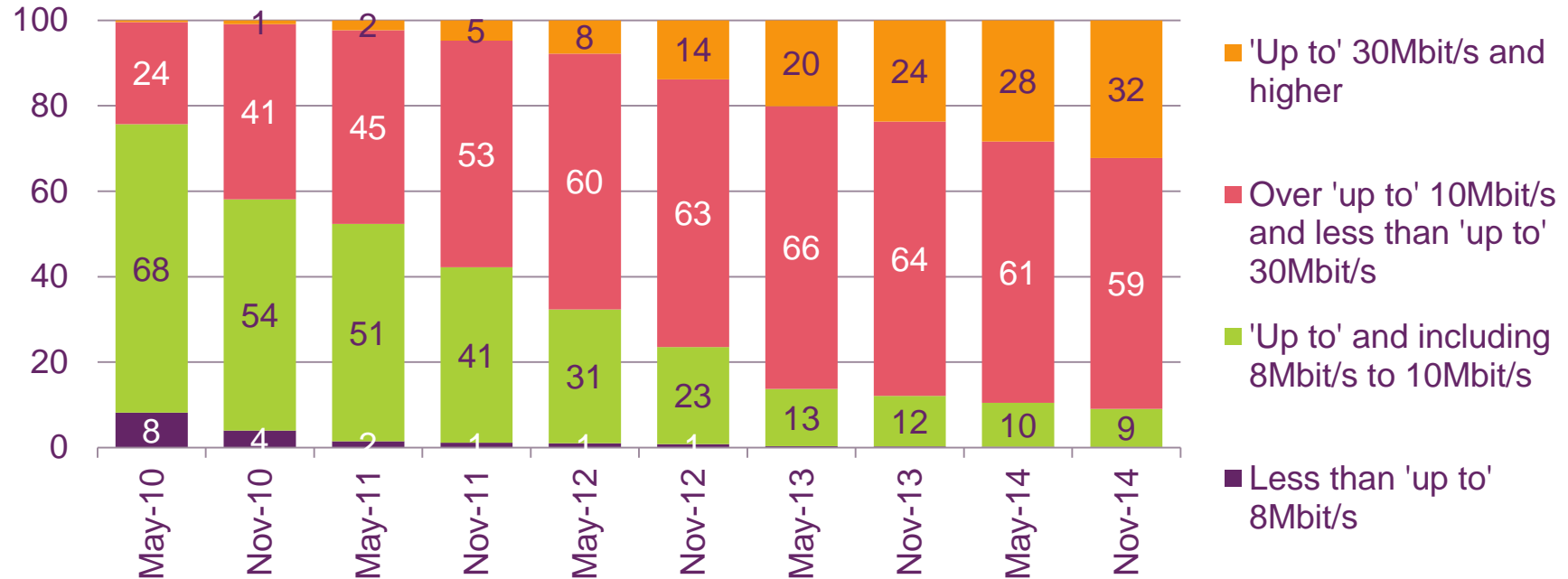


Source: Ofcom / Openreach / Virgin Media / Kcom, May 2015 data

# Figure 4.41

## UK residential broadband lines, by headline speed

Per cent

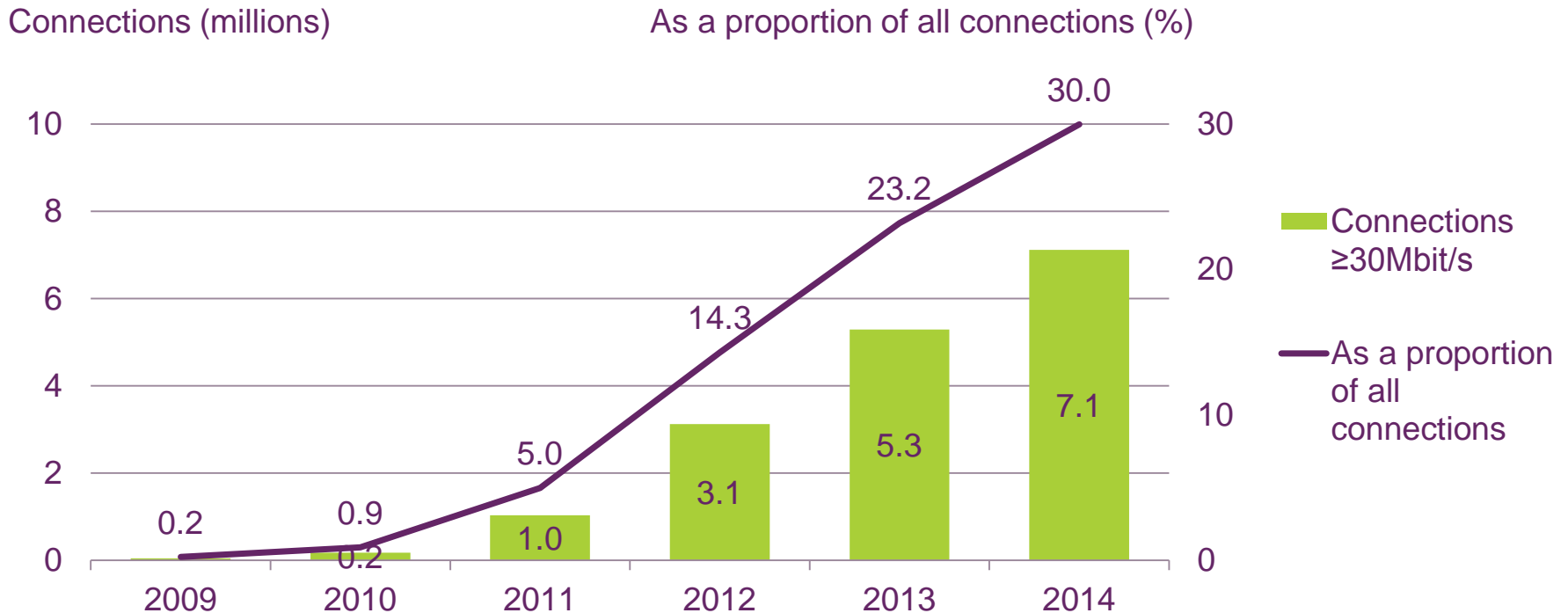


Source: Ofcom, based on data provided by the UK's largest ISPs by retail market share (representing over 90% of the total market).

Note: The above 'up to' 10Mbit/s and less than 'up to' 30Mbit/s category includes ADSL2+ lines which are not marketed using a connection speed.

# Figure 4.42

## Superfast fixed broadband lines



Source: Ofcom / operators

Notes: Includes estimates where Ofcom does not receive data from operators; includes Ofcom adjustment to exclude FTTC connections delivering less than 30Mbit/s.

# Figure 4.43

## Average actual residential fixed broadband download speeds

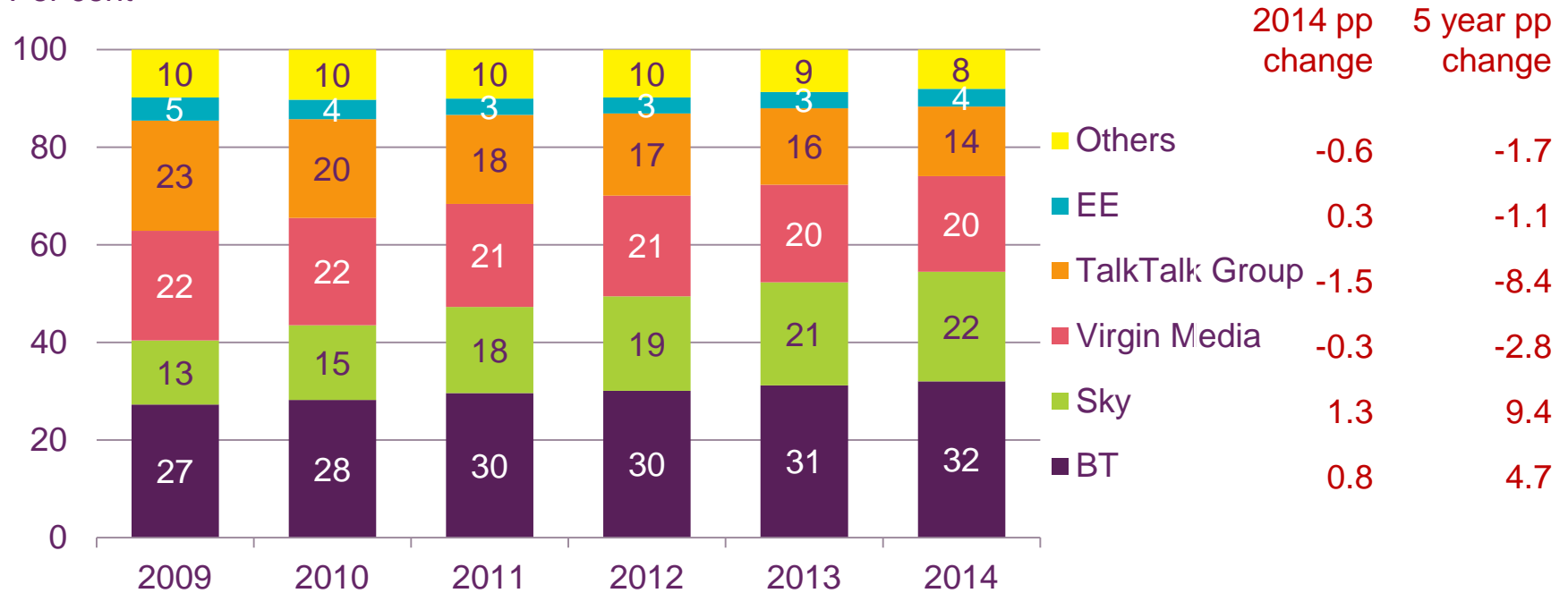


Source: Ofcom, using data provided by SamKnows

# Figure 4.44

## Retail fixed broadband market shares

Per cent

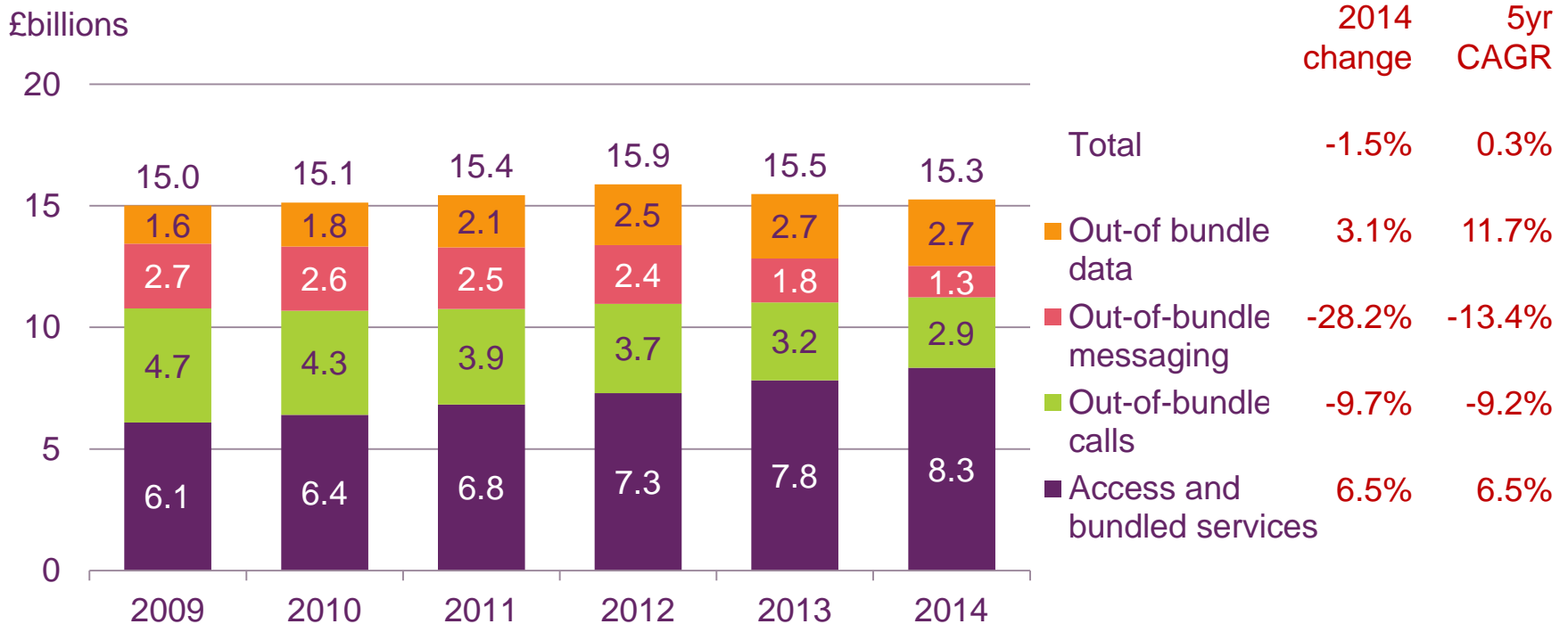


Source: Ofcom / operator data

# Mobile voice and data services

# Figure 4.45

## Mobile retail revenue, by service



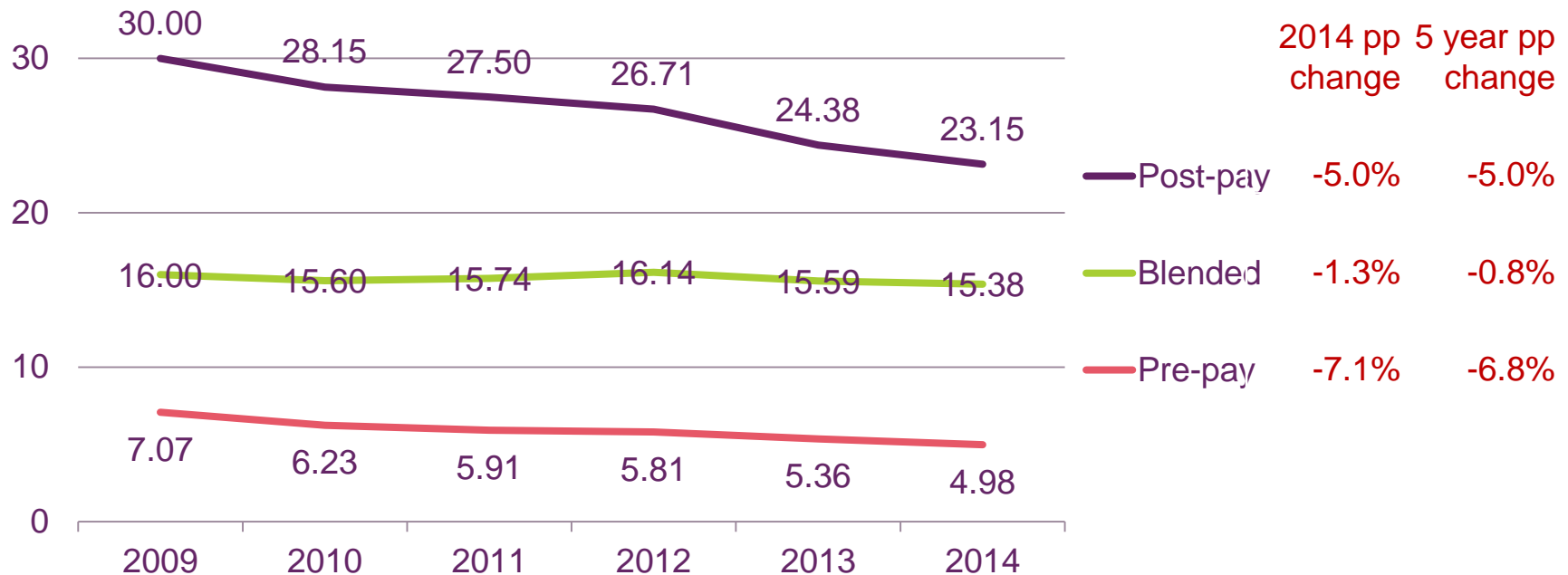
Source: Ofcom / operators



## Figure 4.46

### Average monthly retail revenue per mobile subscription

£ per month

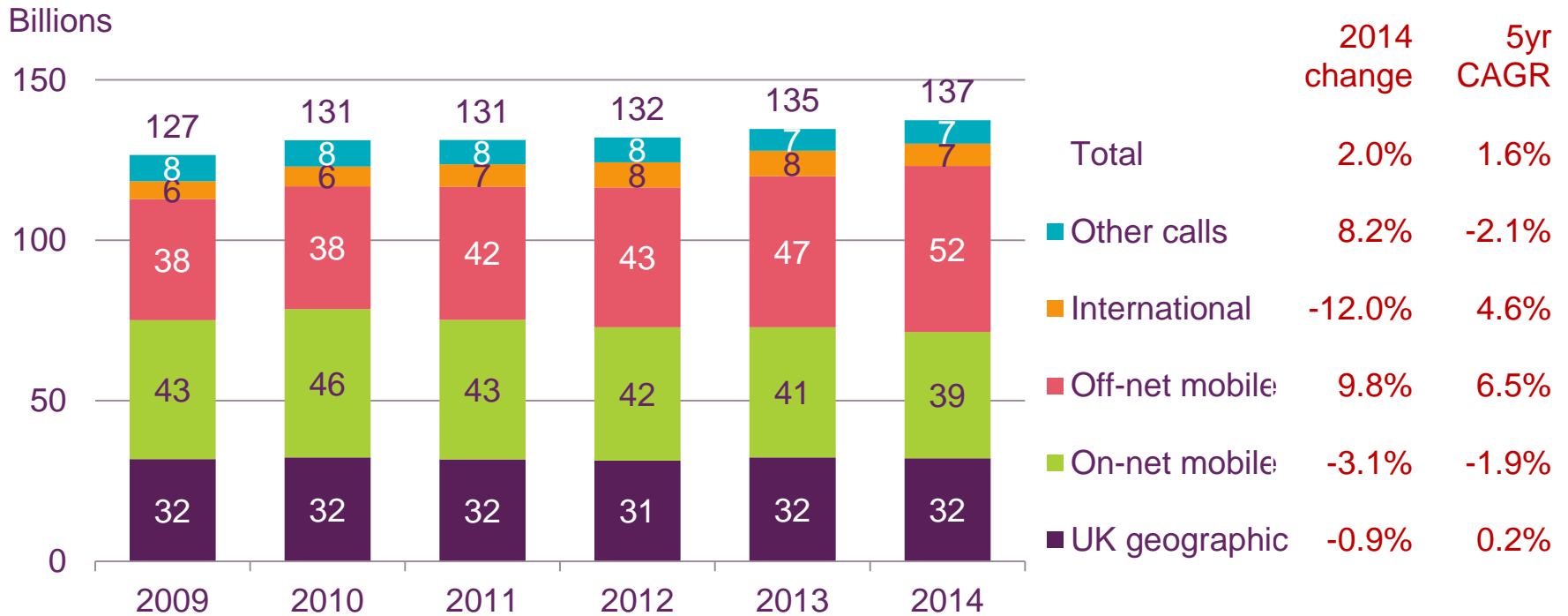


Source: Ofcom / operators

Note: Mobile voice revenues include revenues from bundled messaging and data services.

# Figure 4.47

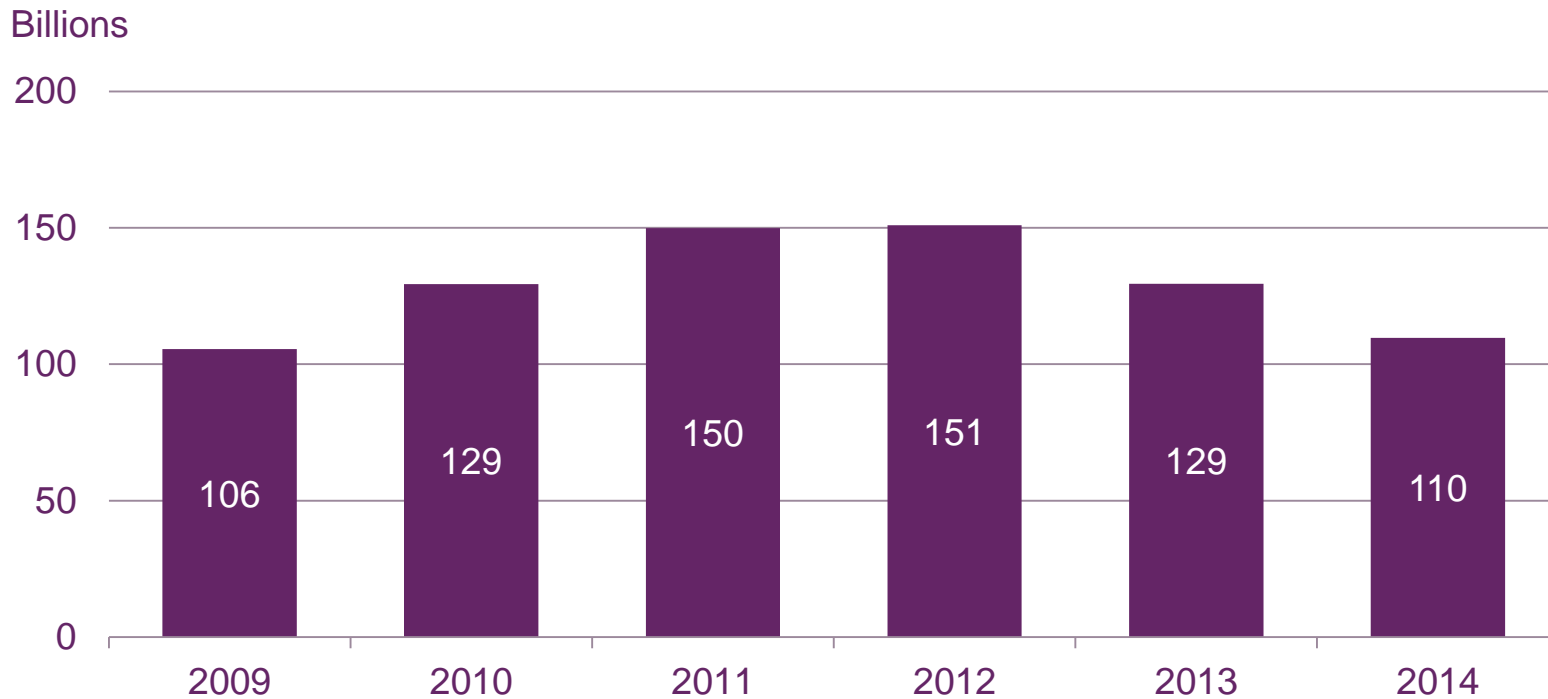
## Outgoing mobile call minutes, by type of call



Source: Ofcom / operators

## Figure 4.48

### Outgoing SMS and MMS messages

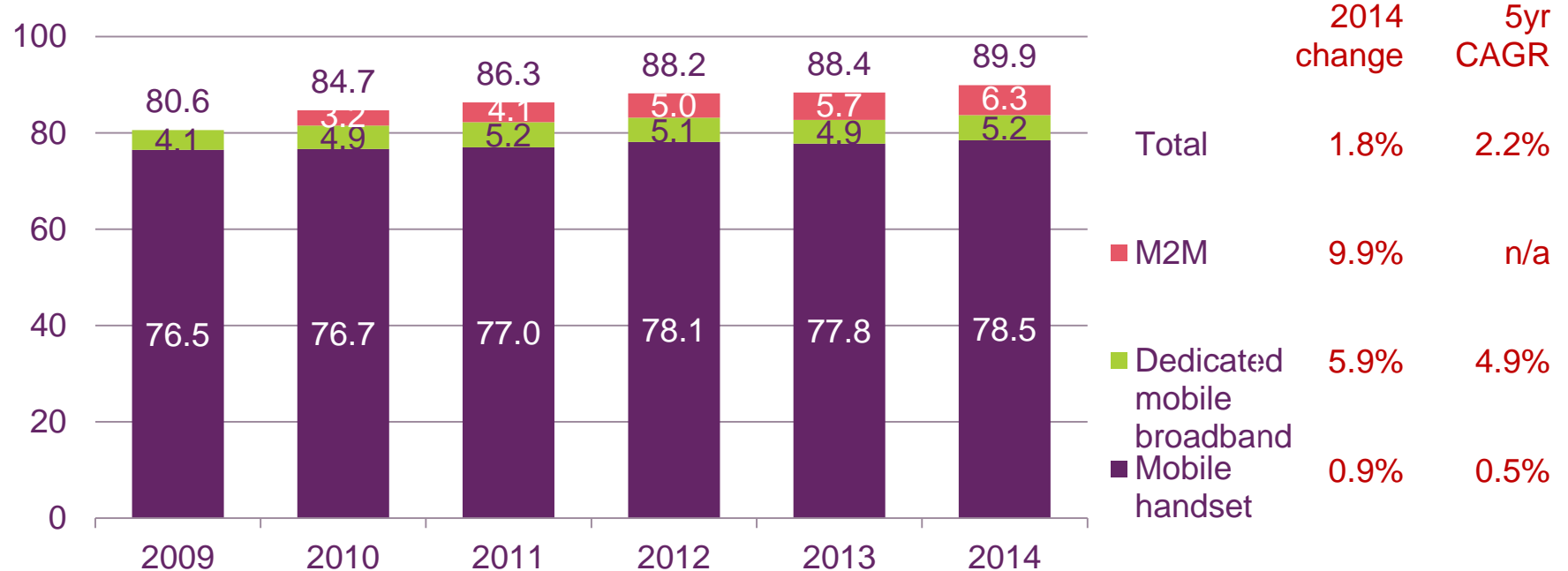


Source: Ofcom / operators

# Figure 4.49

## Mobile subscriptions, by connection type

Millions

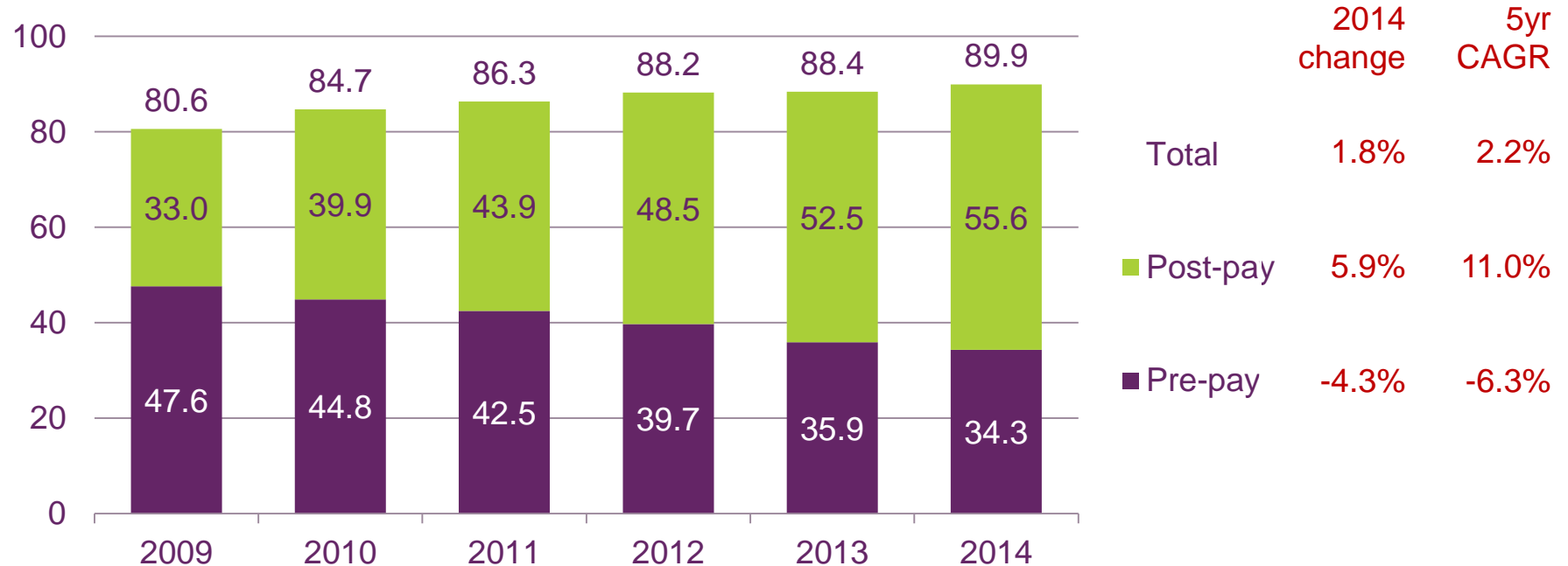


Source: Ofcom / operators

# Figure 4.50

## Mobile subscriptions, by pre-pay and post-pay

Millions



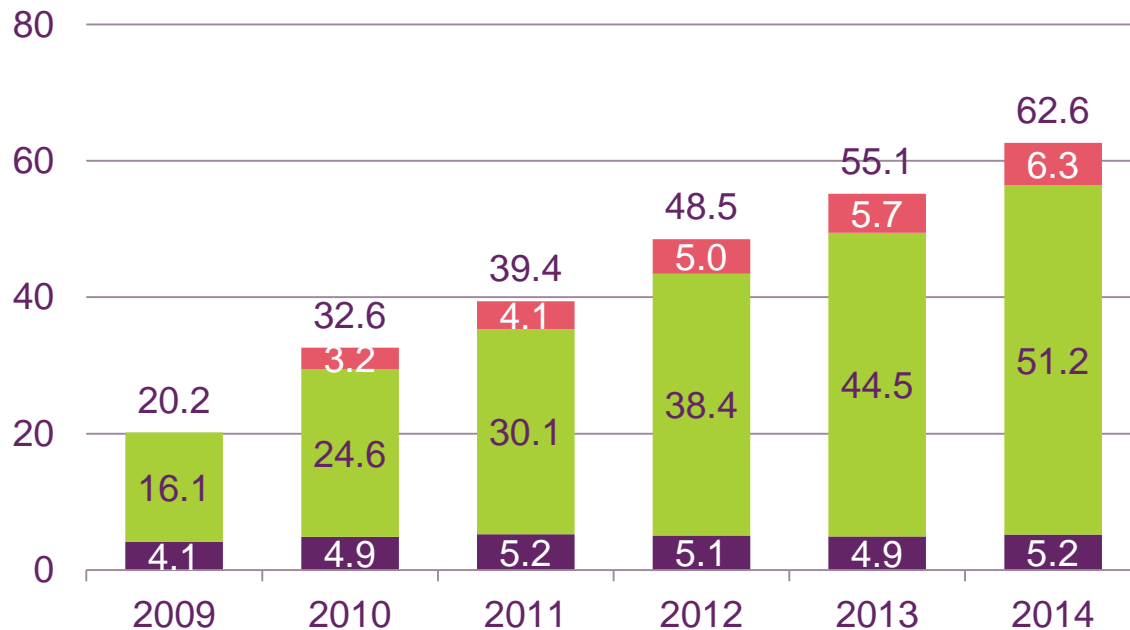
Source: Ofcom / operator data

Note: Includes M2M

# Figure 4.51

## Mobile data connections, by type

Millions



	2014 change	5yr CAGR
Total	13.6%	25.4%
M2M	9.9%	n/a
Internet on handset	14.9%	26.1%
Dedicated mobile broadband	5.9%	4.9%

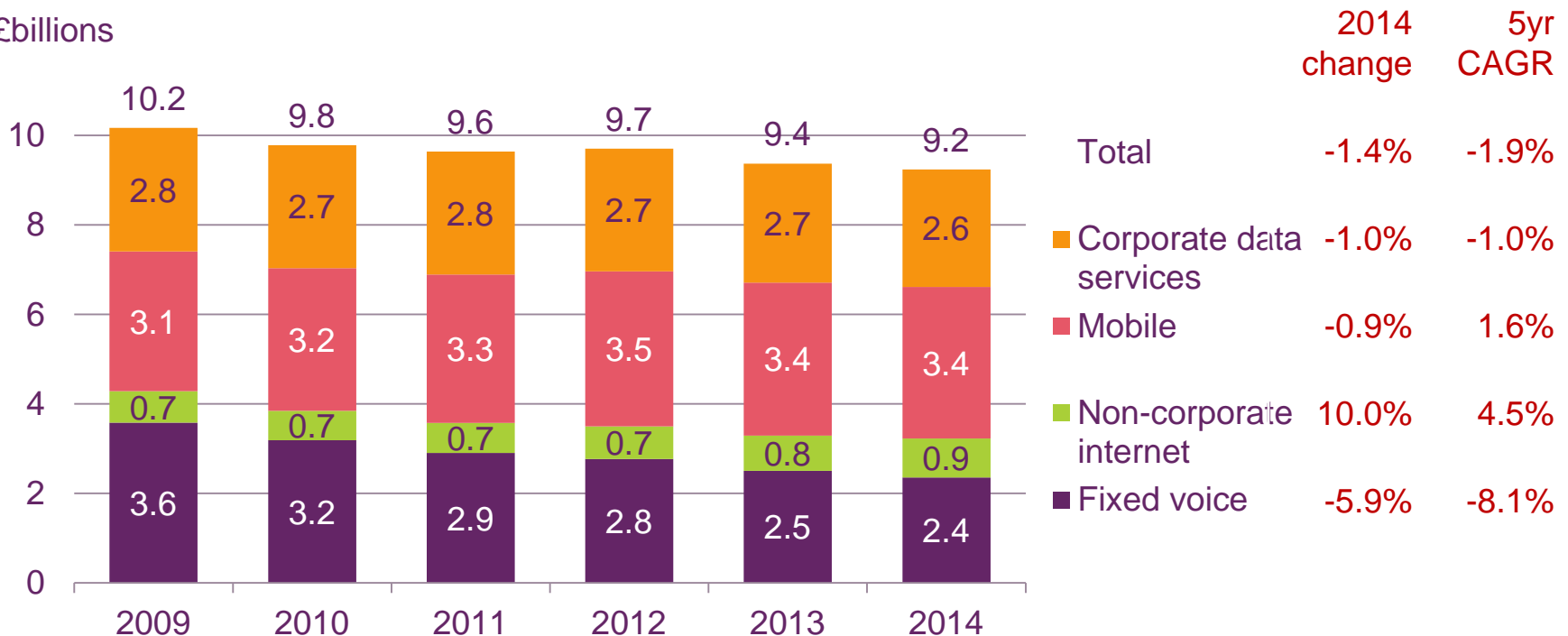
Source: Ofcom / operators

# Business markets

# Figure 4.52

## Retail business telecoms revenues, by service

£billions



Source: Ofcom / operator data, with the exception of corporate data services, sourced from IDC

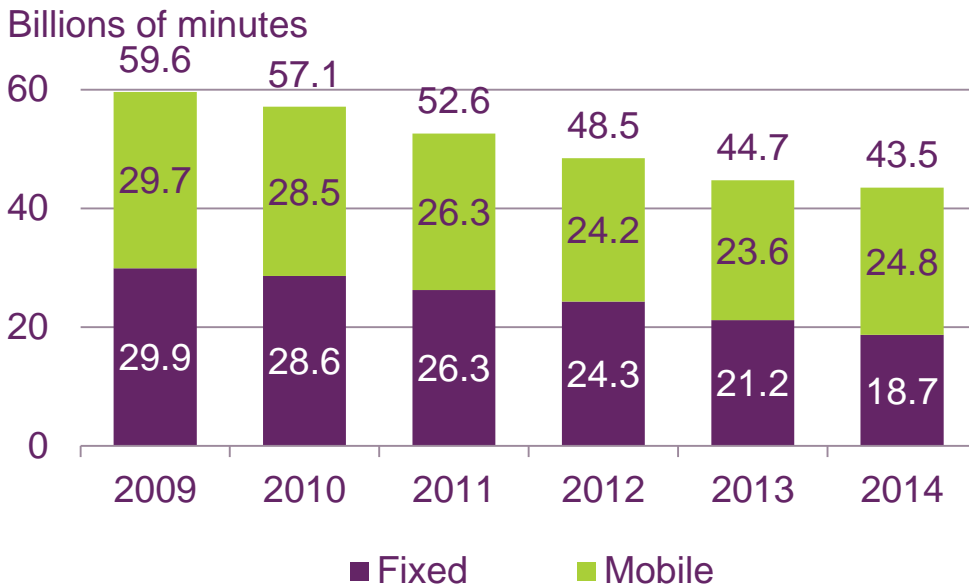
Note: Fixed voice figures exclude revenues from non-geographic voice calls; corporate data services comprises web hosting, Ethernet, IP VPN, digital leased line and frame relay/ATM services.



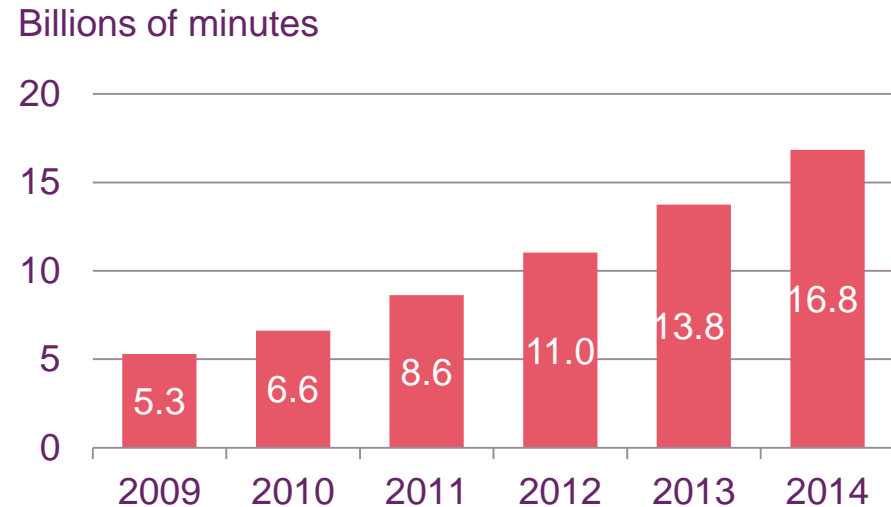
# Figure 4.53

## Business voice call minutes

### Business fixed and mobile voice call minutes



### Business VoIP voice call minutes



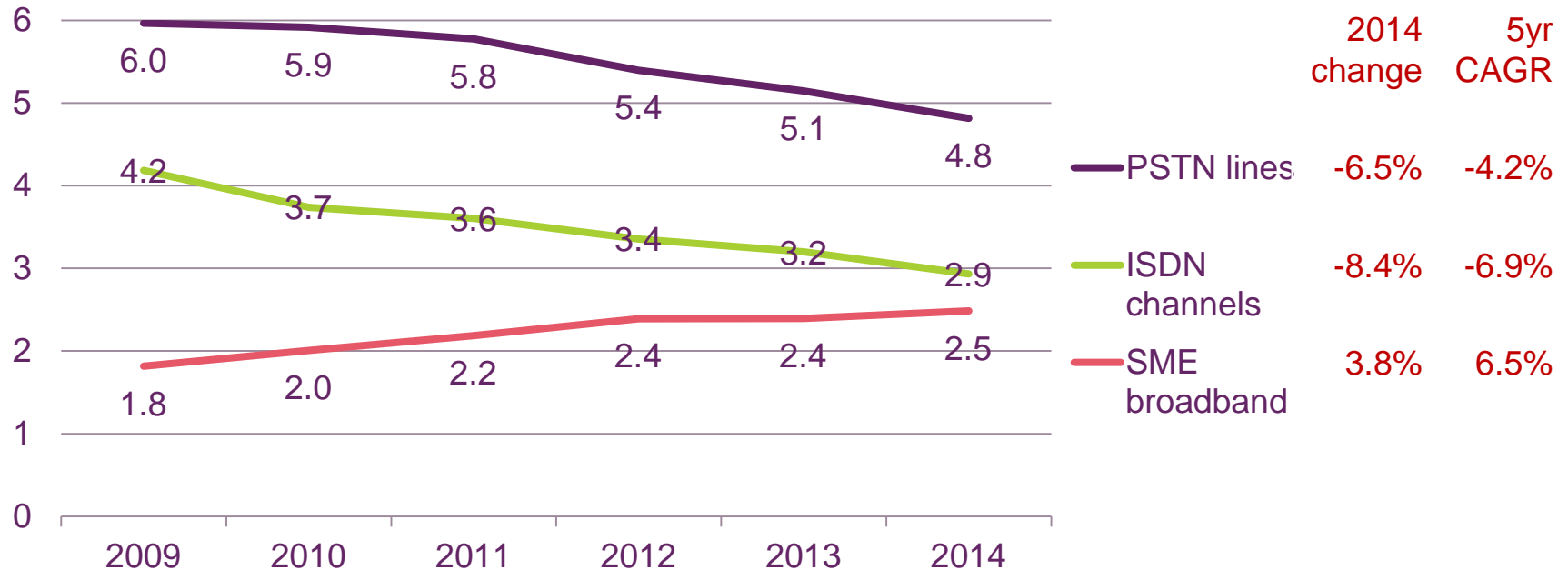
Source: Ofcom / operator data / IDC for VoIP data only

Note: VoIP volumes are not fully captured in the business fixed and mobile voice call minutes chart. It is not possible to sum the totals of both charts to calculate total business call volumes as some VoIP minutes may be included in the business fixed and mobile voice call minutes data.

# Figure 4.54

## Business fixed voice and SME fixed broadband lines

Millions of connections

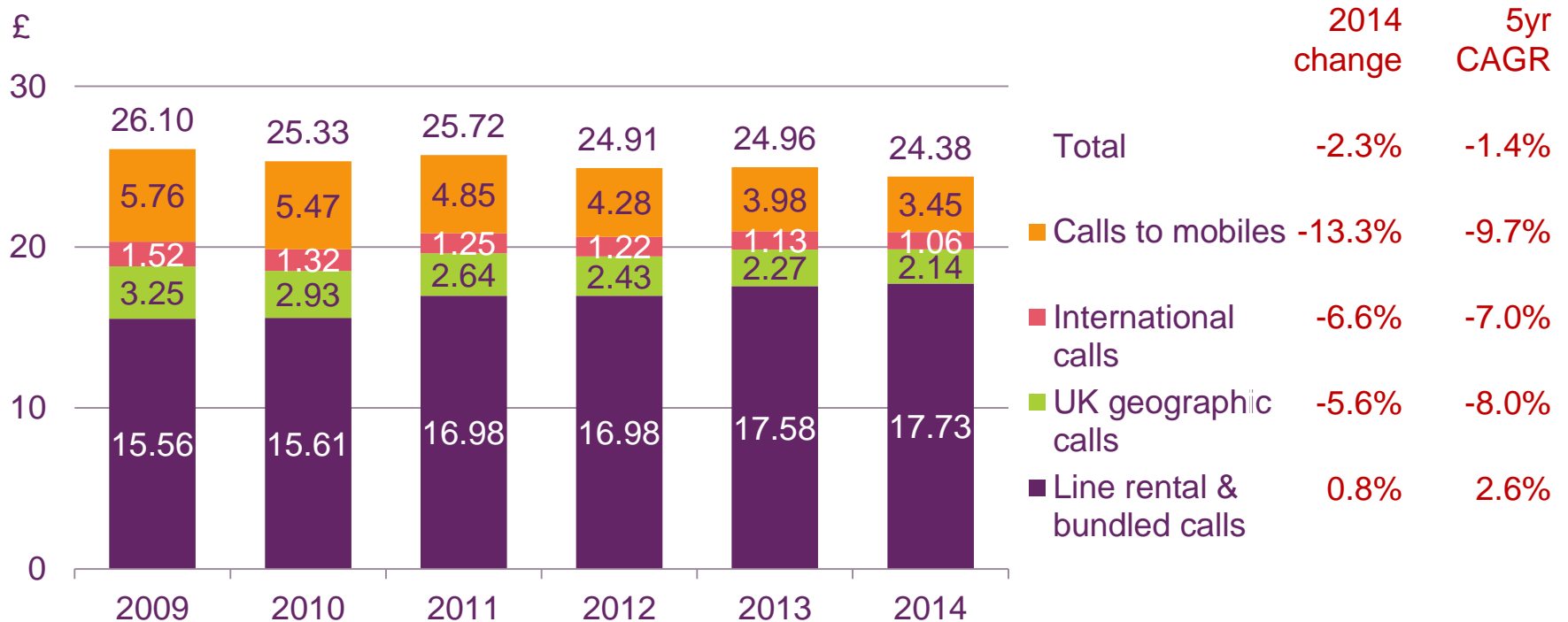


Source: Ofcom / operator data

Note: Mobile voice revenues include revenues from bundled messaging and data services.

# Figure 4.55

## Average monthly retail revenue per business fixed line



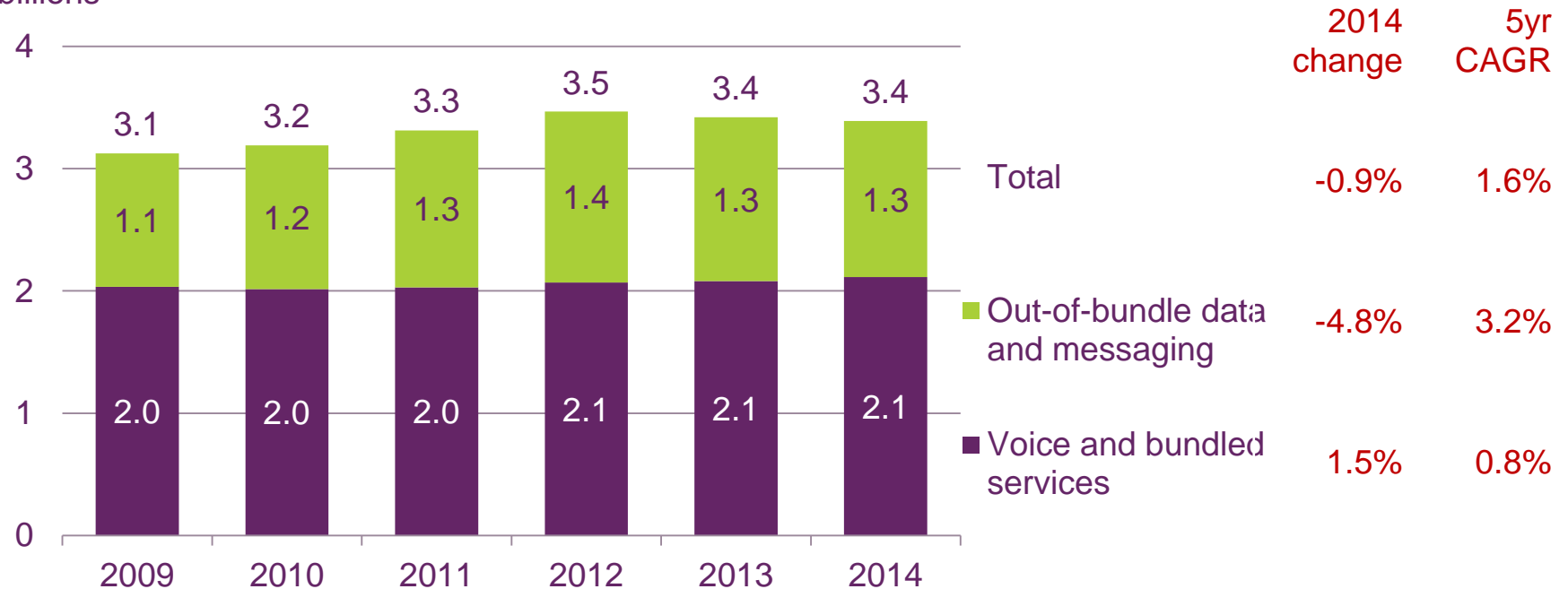
Source: Ofcom / operators

Note: Excludes revenues from non-geographic voice calls.

# Figure 4.56

## Breakdown of business mobile revenues

£billions

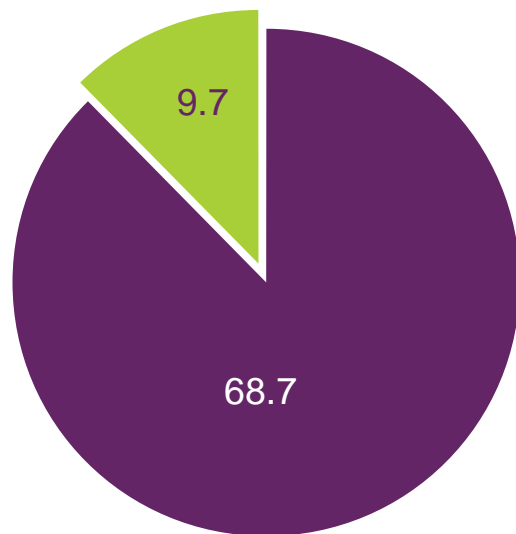


Source: Ofcom / operators

## Figure 4.57

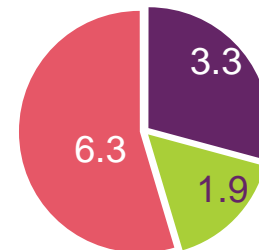
### Business mobile voice and dedicated mobile data connections

Subscriptions (millions)



Subscriptions including voice

- Residential
- Business
- M2M



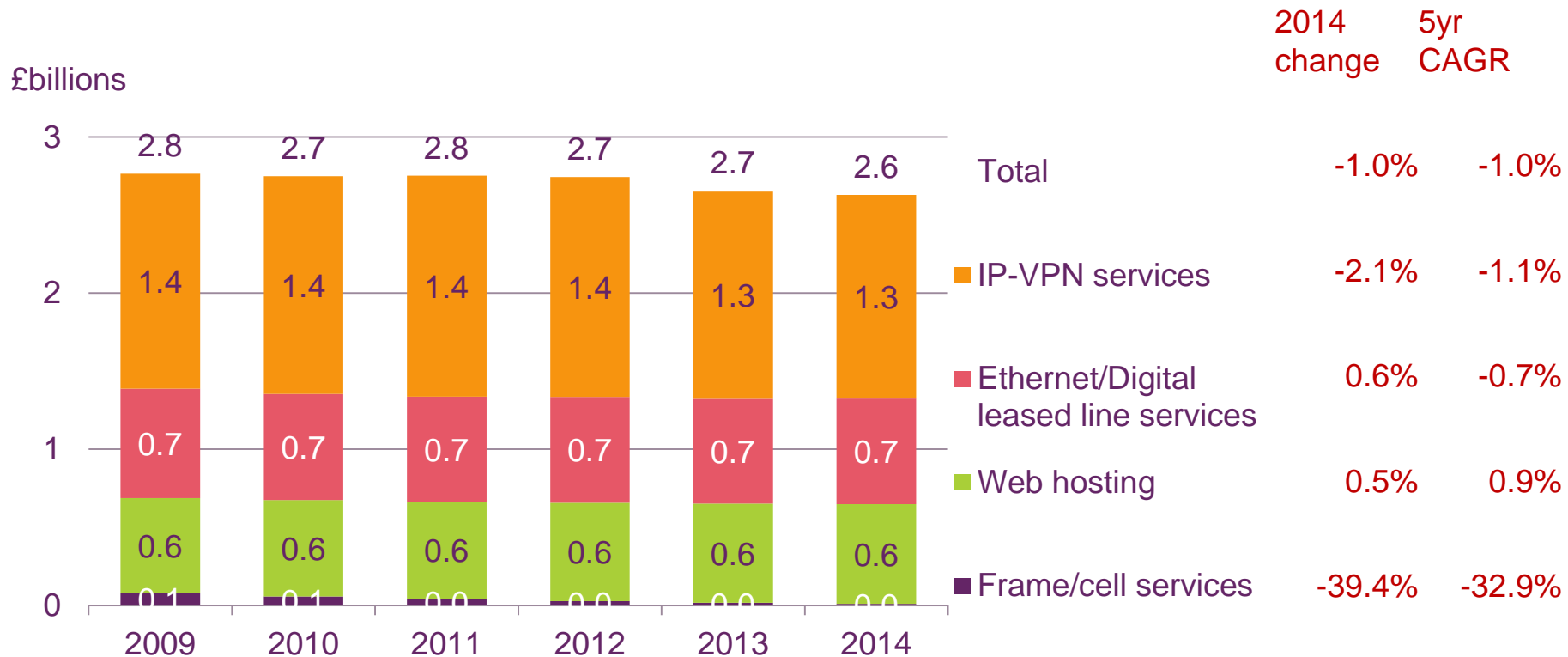
Dedicated data subscriptions

Source: Ofcom / operators

Note: Mobile broadband excludes smartphone data use.

# Figure 4.58

## Breakdown of corporate data services' revenues



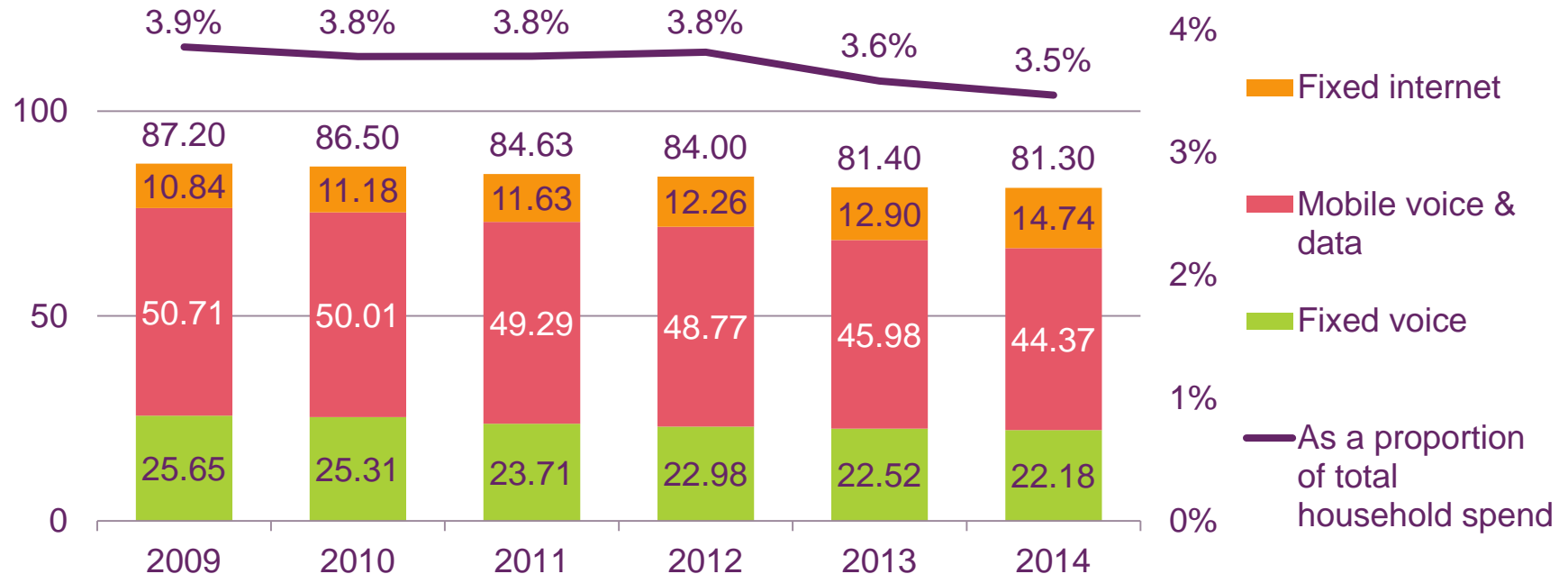
Source: IDC

# The telecoms user

# Figure 4.59

## Average household spend on telecoms services

£ per month (2014 prices)



Source: Ofcom / operators / ONS

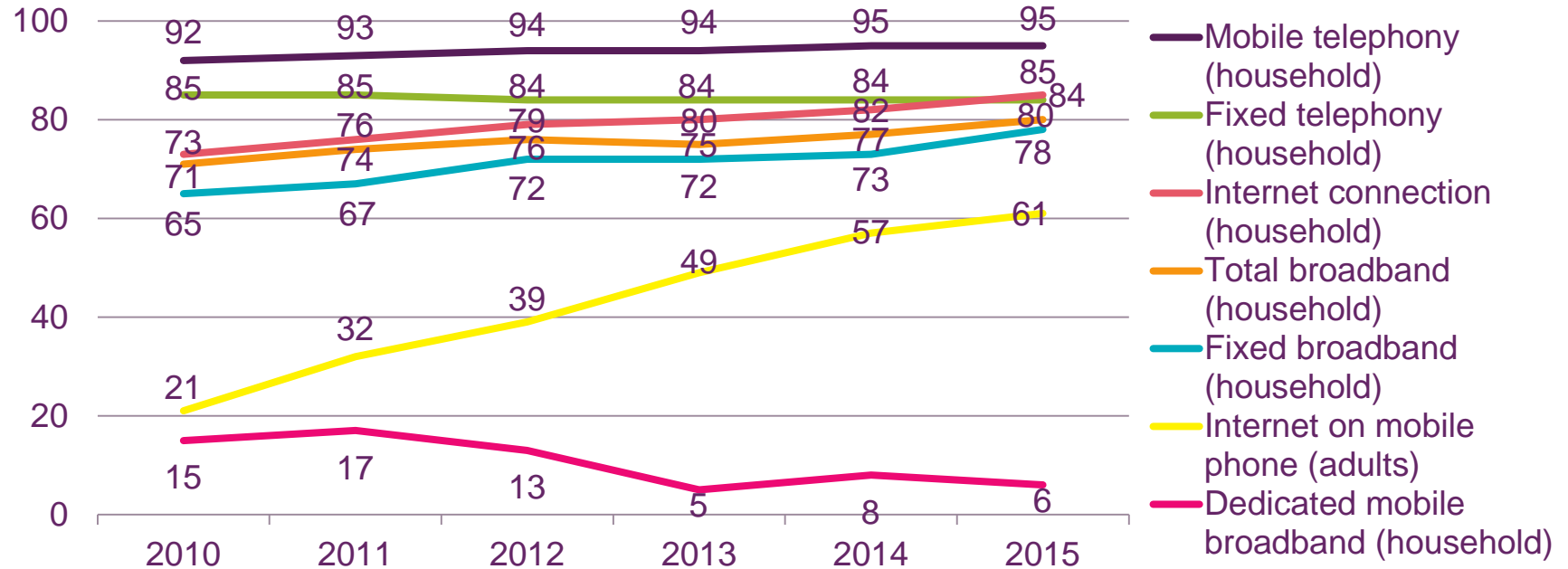
Notes: Includes estimates where Ofcom does not receive data from operators; adjusted to CPI; includes VAT.



# Figure 4.60

## Take-up of key telecoms technologies

Proportion of households / adults (%)



Source: Ofcom Technology Tracker. Data from Q1 of each year 2007-2013, then wave 1 2014-2015.

Base: All adults aged 16+ (2015 n=3756).

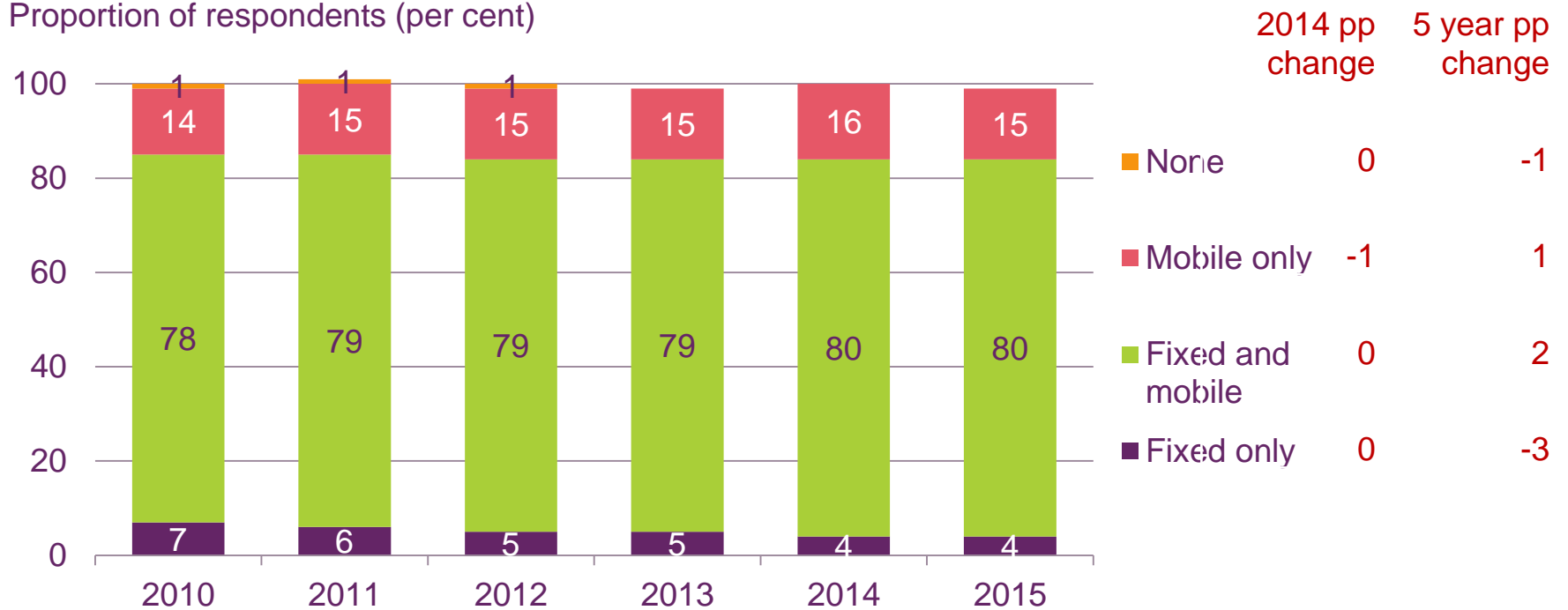
QE1: Does your household have a PC or laptop computer? / QE8(QE2): Do you or does anyone in your household have access to the internet/ World Wide Web at home (via any device, e.g. PC, laptop, mobile phone etc.)? /

QE12(QE9): Which of these methods does your household use to connect to the internet at home? Use of internet

# Figure 4.61

## Cross-ownership of fixed and mobile voice telephony services

Proportion of respondents (per cent)



Source: Ofcom Technology Tracker. Data from Q1 2009-2013, wave 1 2014-2015

Base: All adults aged 16+

QC1: Household phone ownership

## Figure 4.62

### Comparison of average fixed and mobile voice call prices

Pence per minute



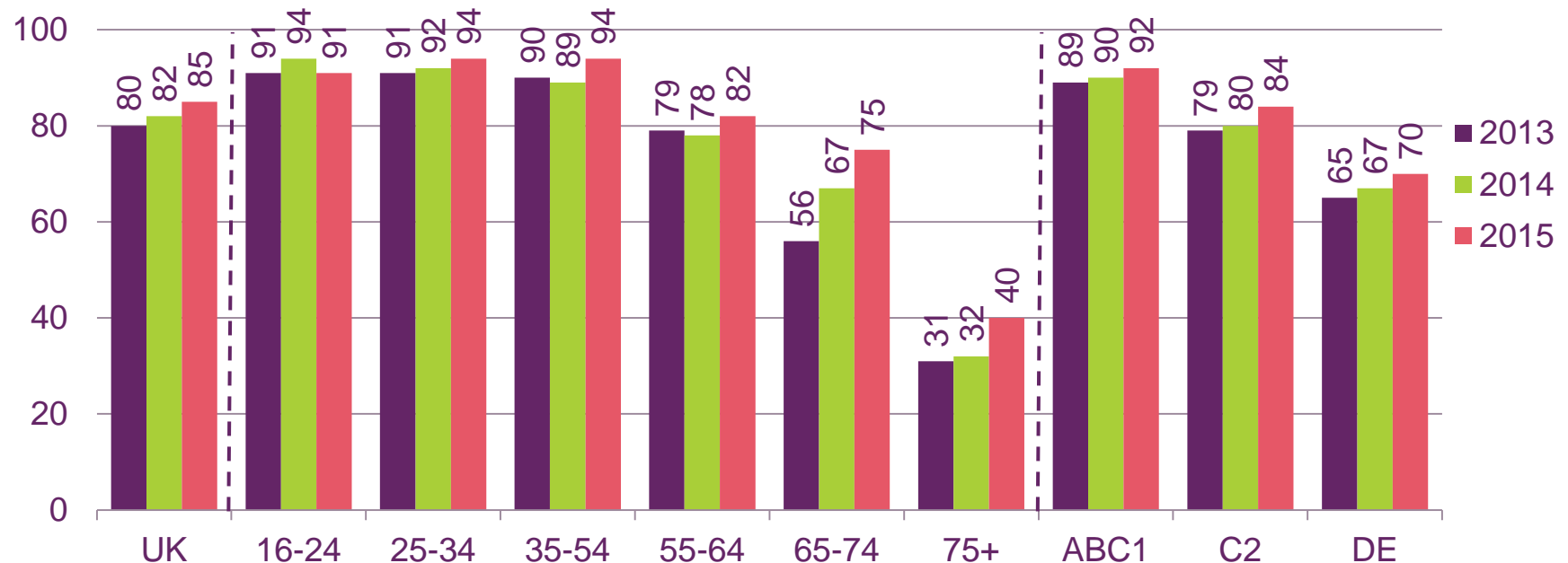
Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators; fixed calculation excludes non-geographic voice calls.

# Figure 4.63

## Home internet access, by age and socio-economic group

Proportion of adults (per cent)



Source: Ofcom Technology Tracker. Data from Q1 2013, W1 2014-2015

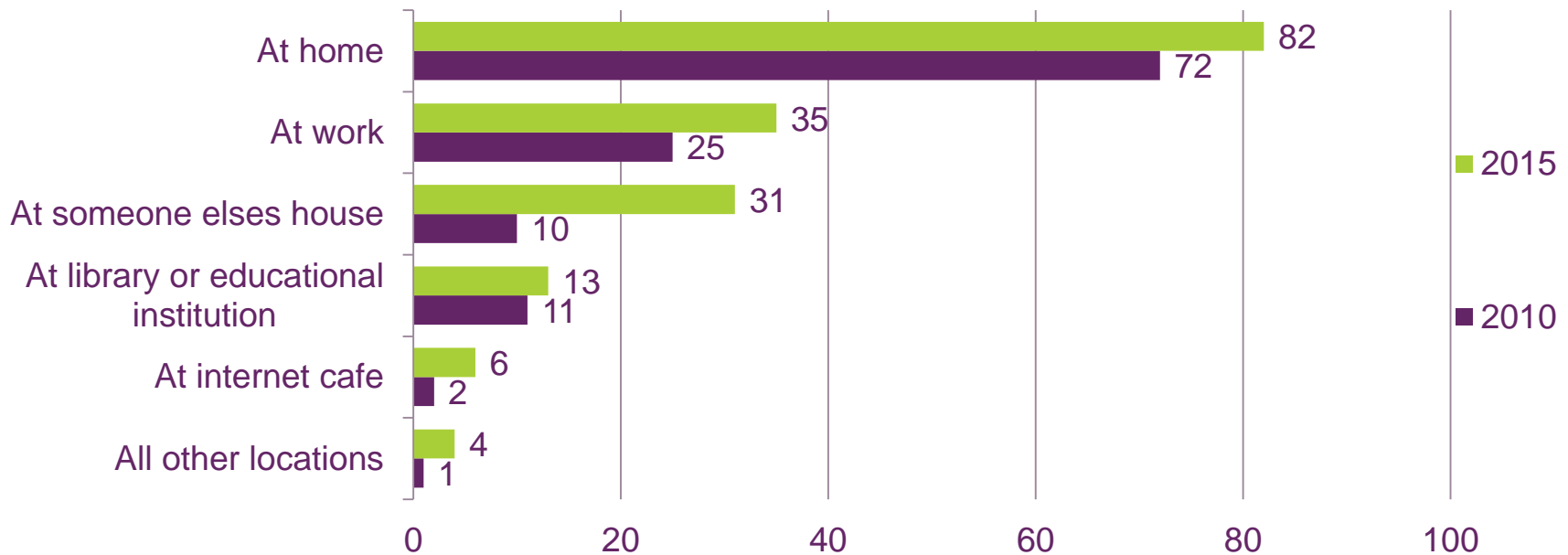
Base: All adults aged 16+ (n=3756)

QE8(QE2): Do you or does anyone in your household have access to the internet/ World Wide Web at home (via any devices, e.g. PC, laptop, mobile phone etc)?

# Figure 4.64

## Location of internet access

Proportion of adults aged 16+ (per cent)



In total, 86% of adults used the internet in Q1 2015

Source: Ofcom Technology Tracker. Data from Q1 2010, wave 1 2015

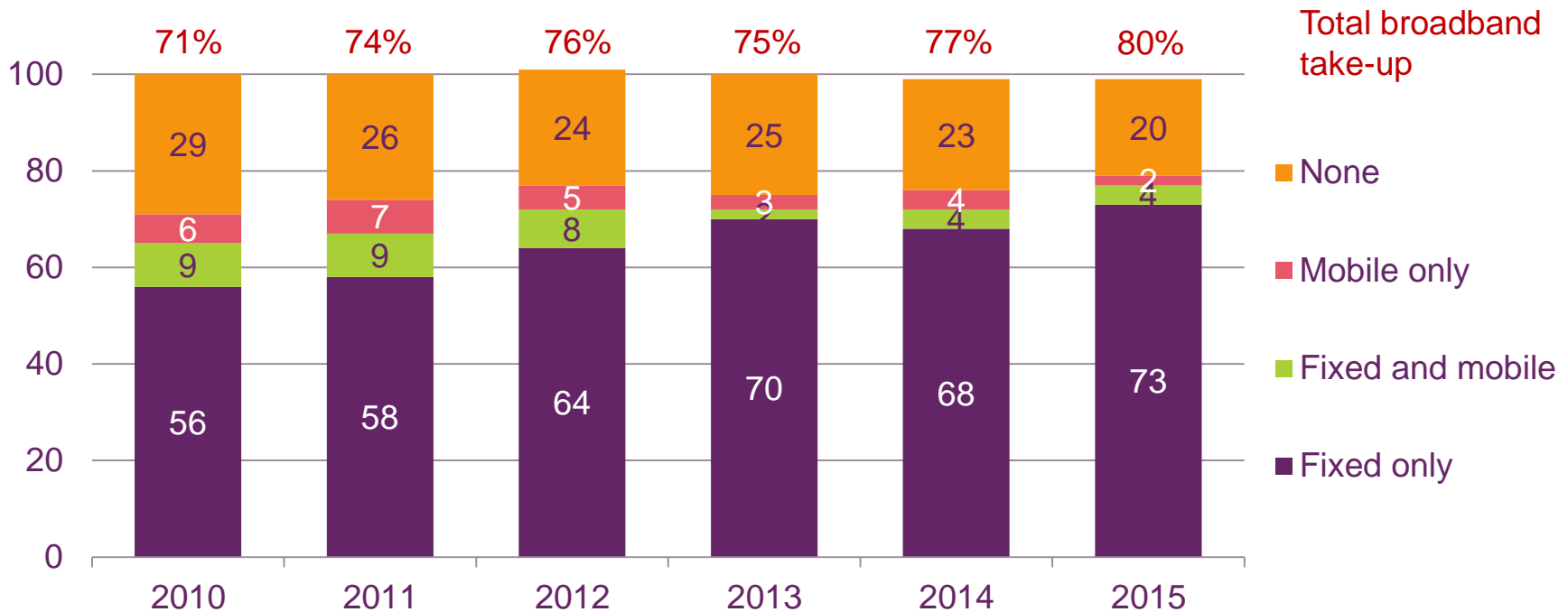
Base: All adults 16+

QE9(IN6): Do you ever go online anywhere other than in your home at all (via any device, e.g. PC, laptop, mobile phone, etc.)? IF YES: Where is that?

# Figure 4.65

## Household penetration of fixed and dedicated mobile broadband

Proportion of respondents (per cent)



Source: Ofcom Technology Tracker. Data from Q1 of each year 2009-2013, then wave 1 2014-2015

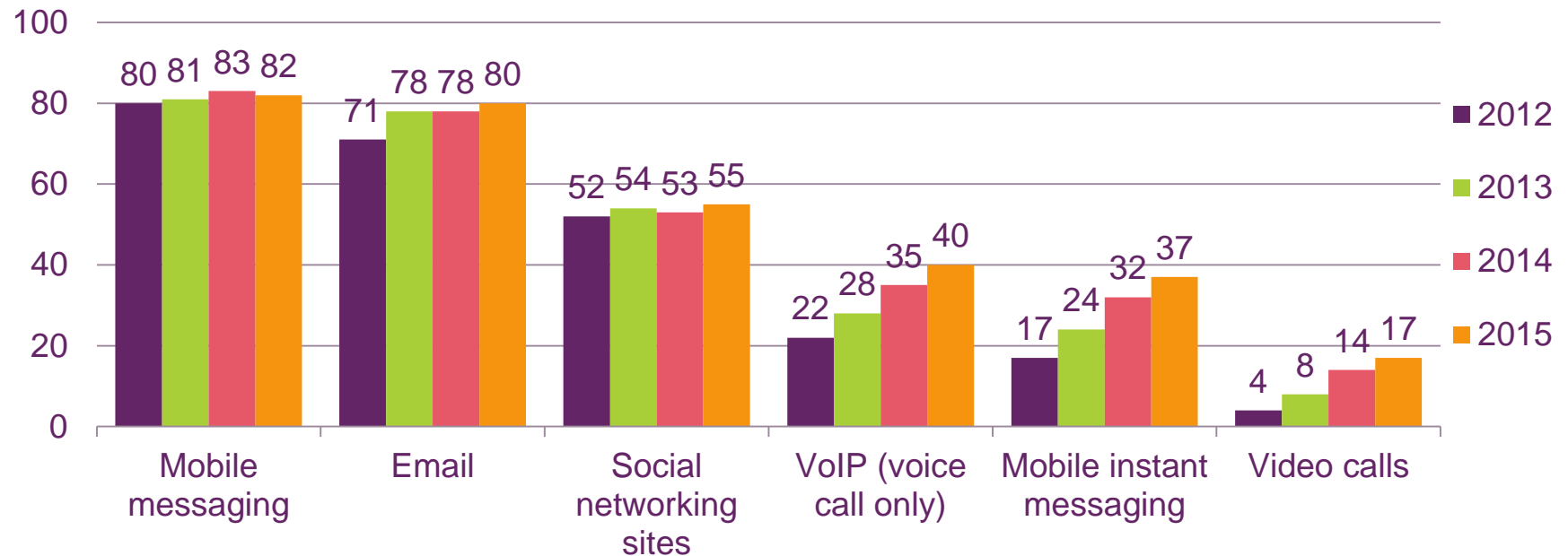
Base: All adults aged 16+ (6090 in 2009, 9013 in 2010, 3474 in 2011, 3772 in 2012, 3750 in 2013, 3740 in 2014, 3756 in 2015)

Note: Excludes smartphone only homes.

# Figure 4.66

## Use of methods of communication other than traditional voice telephony

Proportion of respondents (per cent)



Source: Ofcom Technology Tracker. Data from Q1 2012-2013, wave 1 2014-2015

Base: All adults 16+

Note: VoIP data for 2013 are not comparable to those from previous years they have been compiled on a different basis.

QD28A Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? QE5A Which, if any, of these do you use the internet for? QE30 Have you or anyone in your household ever

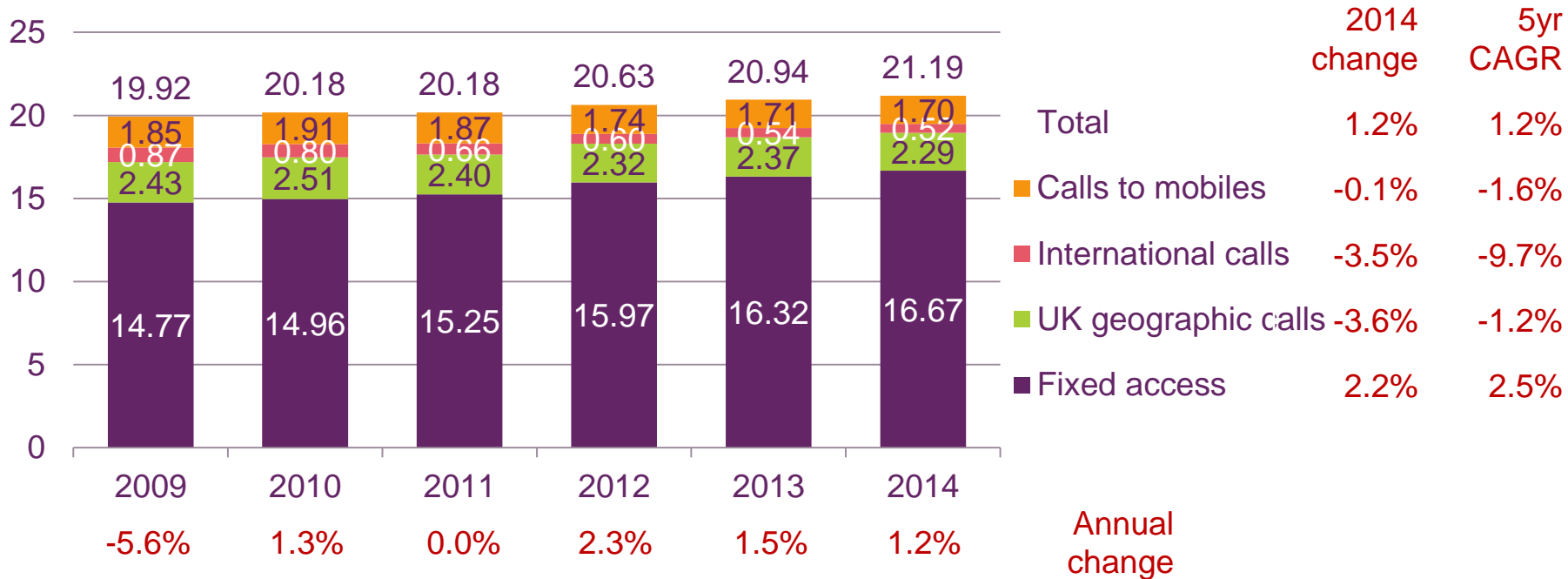
# Fixed voice services



# Figure 4.67

## Real price of a basket of residential fixed voice services

£ per month (2014 prices)

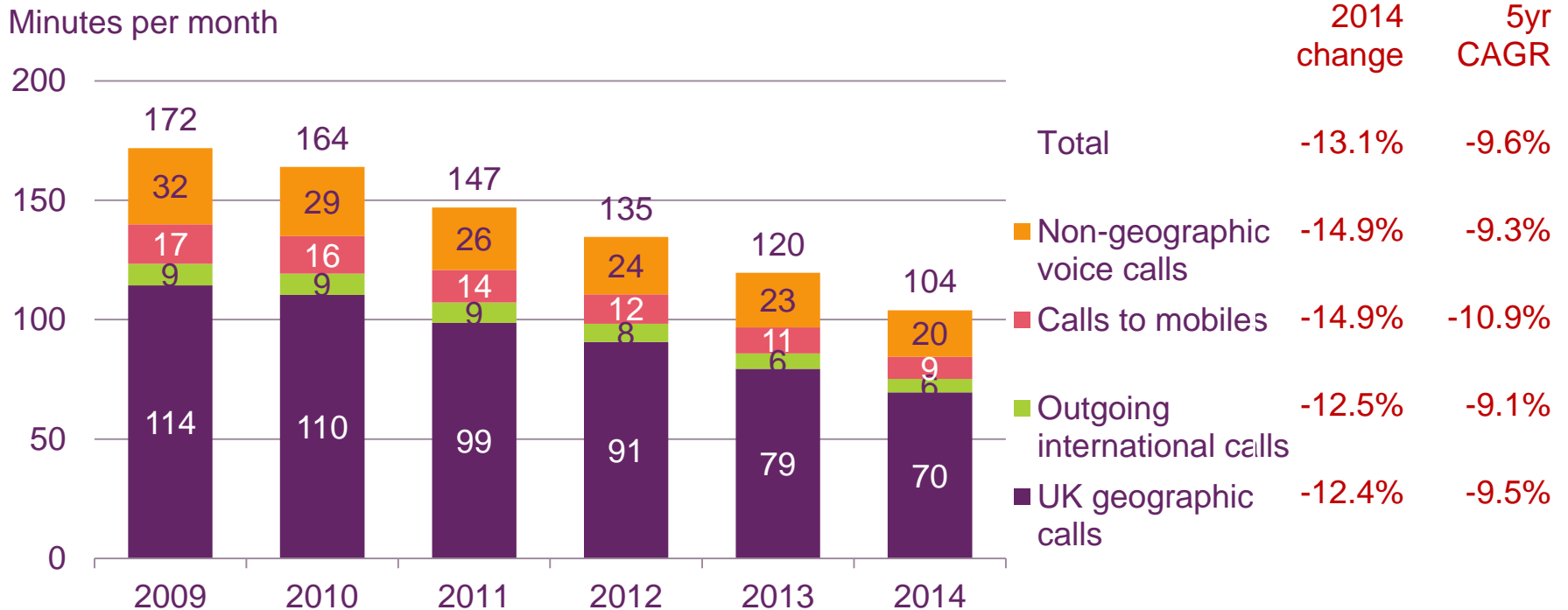


Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators; excludes non-geographic voice calls; adjusted for CPI; includes VAT.

# Figure 4.68

## Average monthly outbound fixed voice call volumes per person

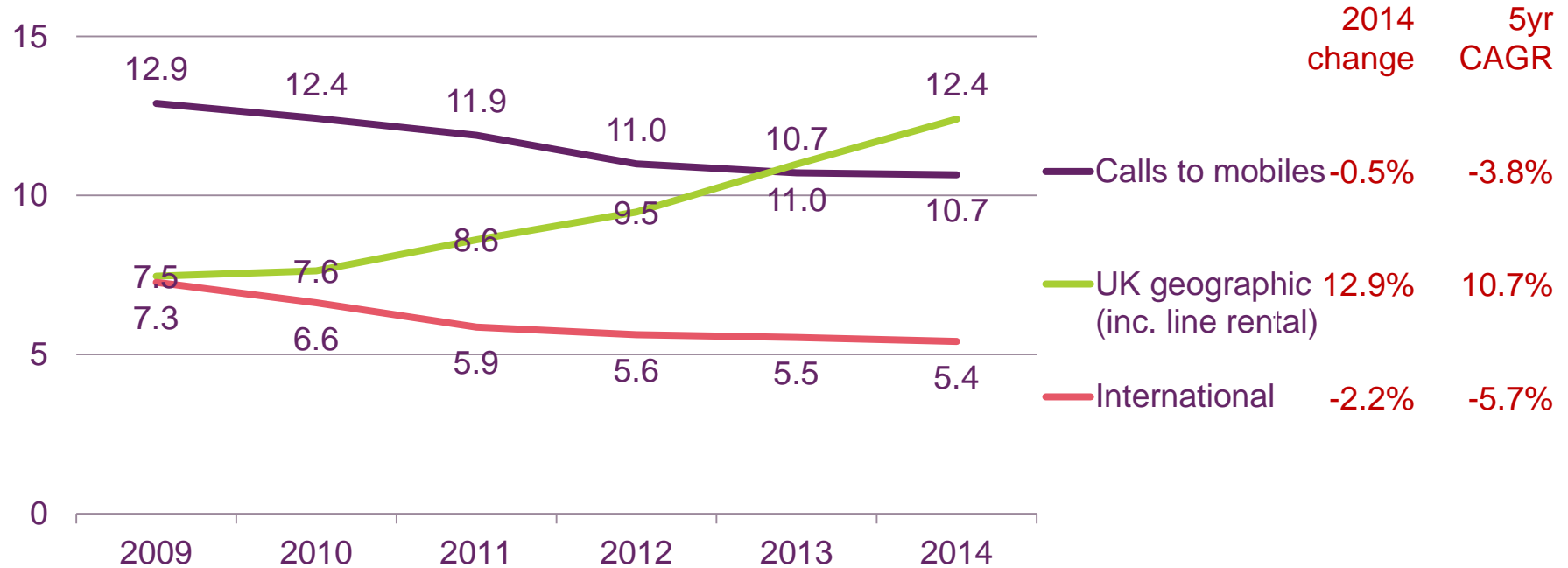


Source: Ofcom / operators

# Figure 4.69

## Average revenue per fixed-voice call minute

Pence per minute

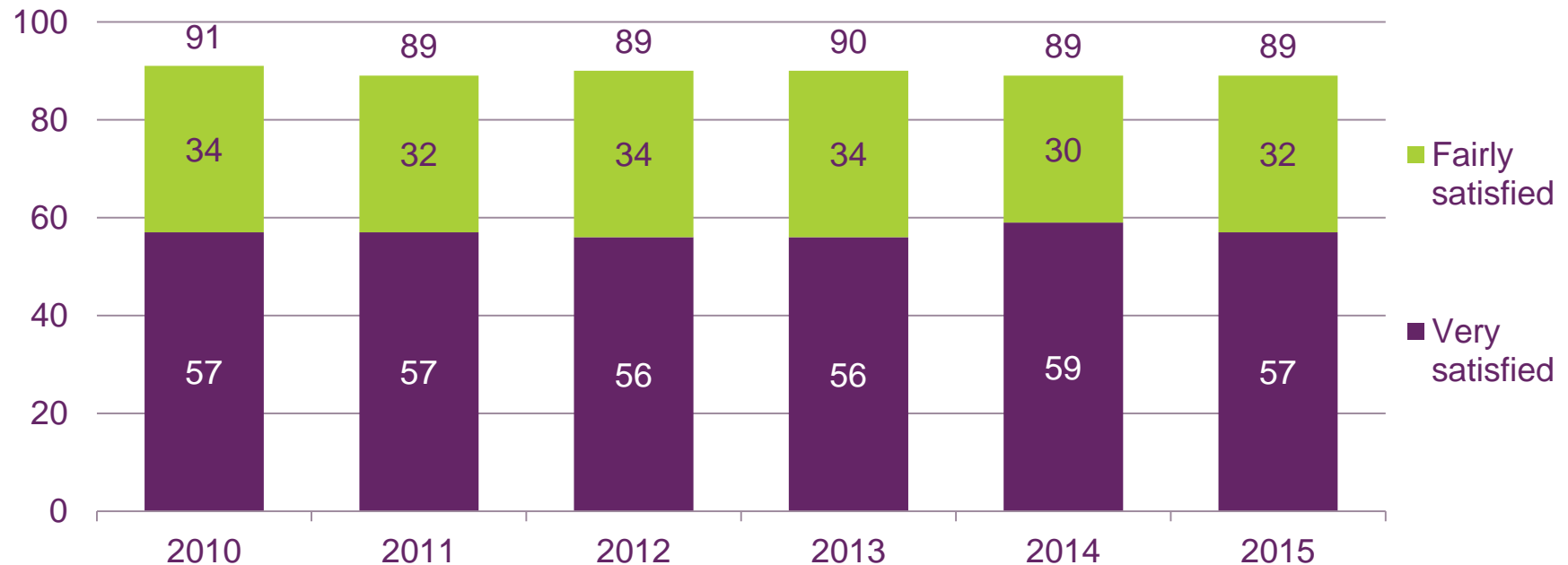


Source: Ofcom / operators

# Figure 4.70

## Overall satisfaction with residential fixed voice services

Proportion of adults with service (%)



Source: Ofcom Technology Tracker. Data from Q1 2010-2013, wave 1 2014-2015

Base: All adults aged 16+ with a fixed line phone

Note: Includes only those who expressed an opinion.

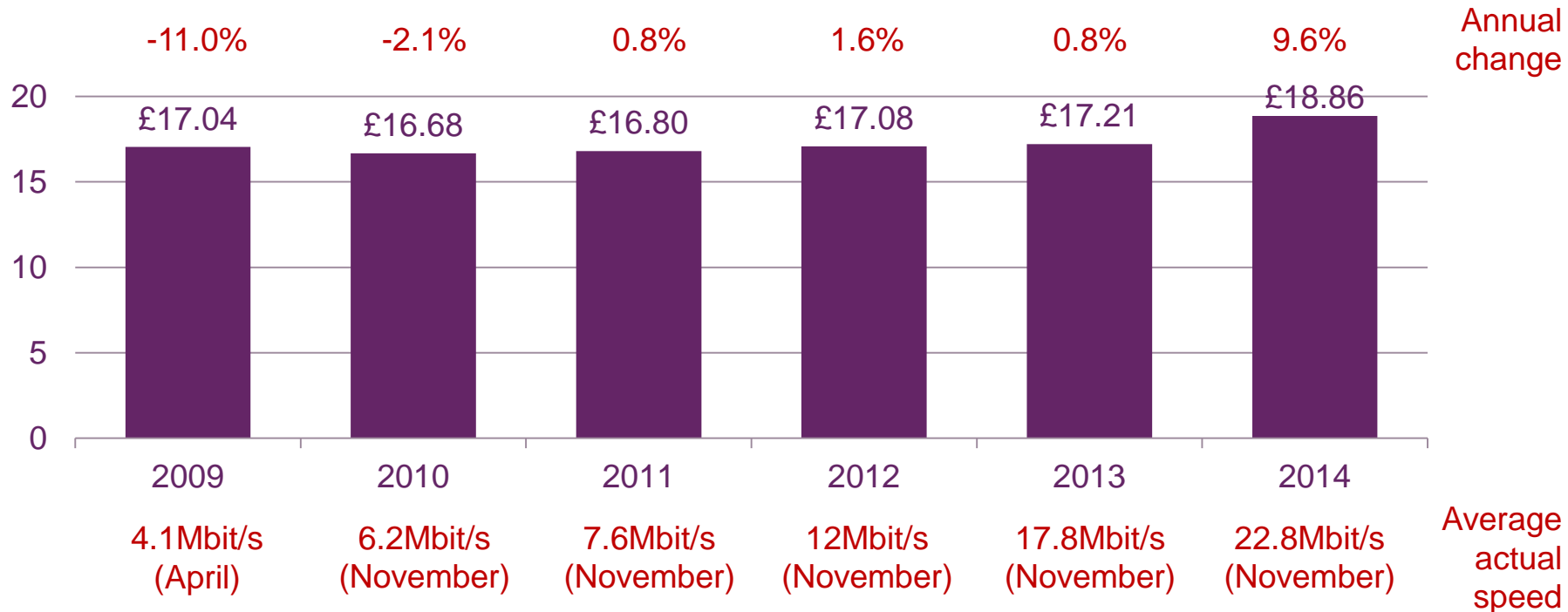
Q: Thinking about your home phone service only, please use this card to say how satisfied you are with the overall service provided by (main supplier)?

# Fixed data services

# Figure 4.71

## Real average monthly price of a residential fixed broadband connection

£ per month (2014 prices)



Source: Ofcom / operator data

Note: Includes estimates where Ofcom does not receive data from operators; includes VAT; adjusted for CPI. Excludes cost of line rental.

## Figure 4.72

### Lowest-cost bundled fixed broadband options from major ISPs

	Standard broadband only	Standard broadband & fixed line	Standard broadband, fixed line & pay-TV	Broadband ≥30Mbit/s only	Broadband ≥30Mbit/s & fixed line	Broadband ≥30Mbit/s, fixed line & pay-TV
BT	-	21.49	24.49	-	24.49	24.49
EE	-	26.35	29.35	-	36.35	39.35
Plusnet	12.49*	25.94	-	17.49*	30.94	-
Sky	-	23.90	33.89	-	26.40	46.40
TalkTalk	-	21.70	26.70	-	31.70	36.70
Virgin Media	**	**	**	28.50	34.49	38.99

Source: Pure Pricing UK Broadband Pricing Briefing, 10 June 2015

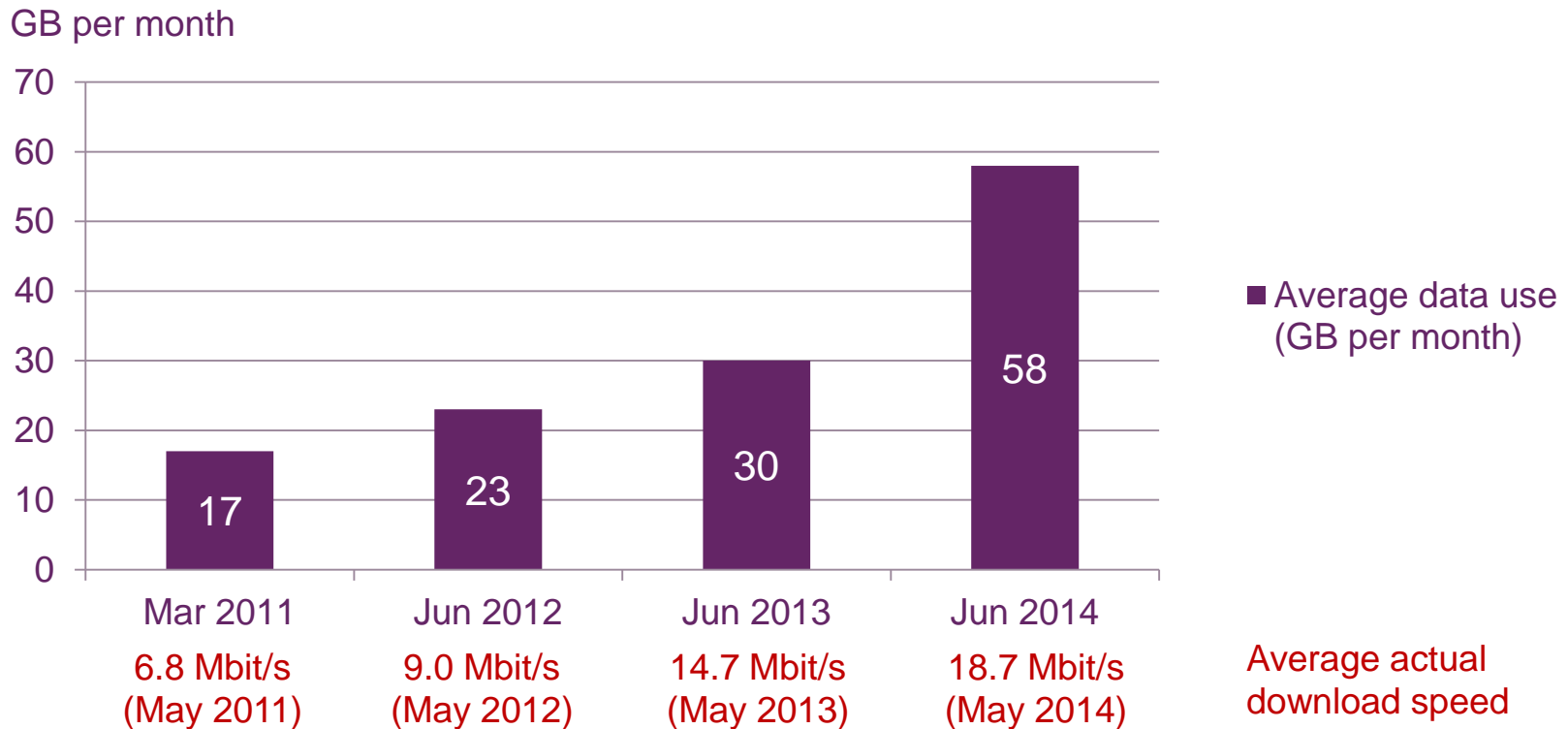
Note: All tariffs exclude activation charges and promotional discounts and include VAT; all tariffs are the lowest price available; contract lengths vary; allowances for fixed-line and mobile calls, and availability of TV channels included within packages may differ by operator and option. Prices shown are packages as marketed to customers. Some operators allow users to customise packages to include e.g. anytime calls.

\*Plusnet 'broadband only' offers require a fixed line service from Plusnet or another BT based landline provider.

\*\* Virgin Media does not offer broadband at speeds lower than 30Mbit/s.

# Figure 4.73

## Average fixed broadband data use



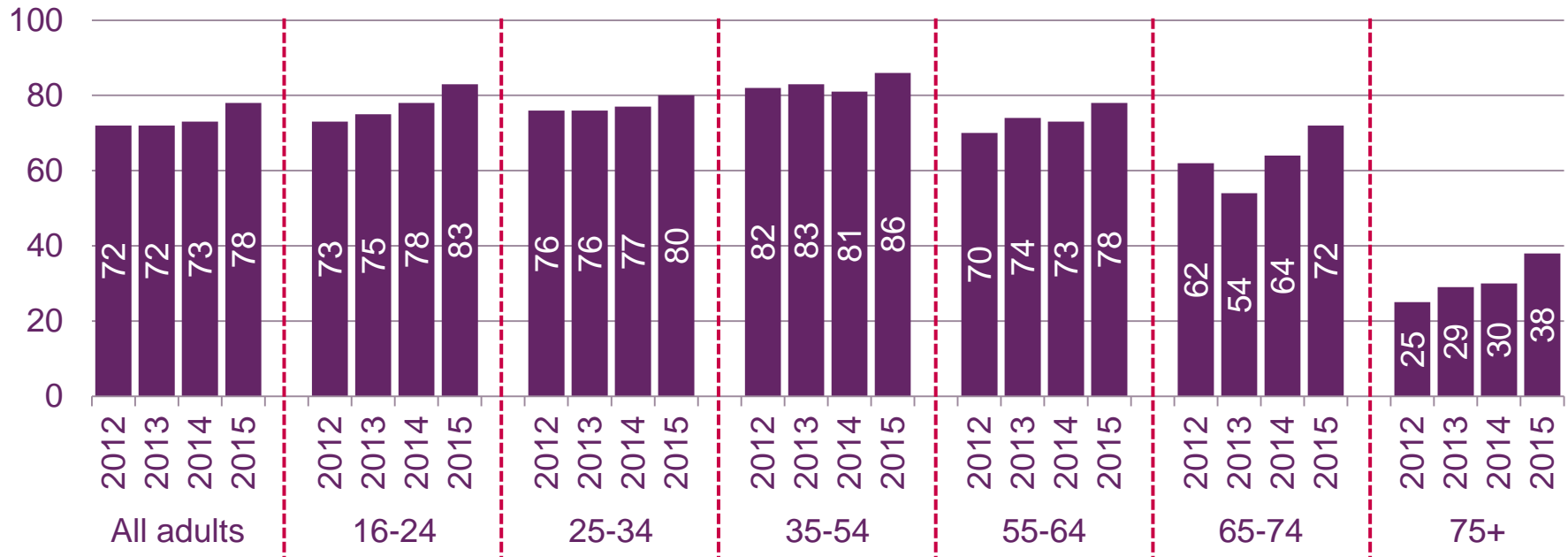
Source: Ofcom Infrastructure Reports 2011 - 2014



# Figure 4.74

## Take-up of fixed broadband, by age

Proportion of households (per cent)



Source: Ofcom Technology Tracker. Data from Q1 2013, then wave 1 2014-2015

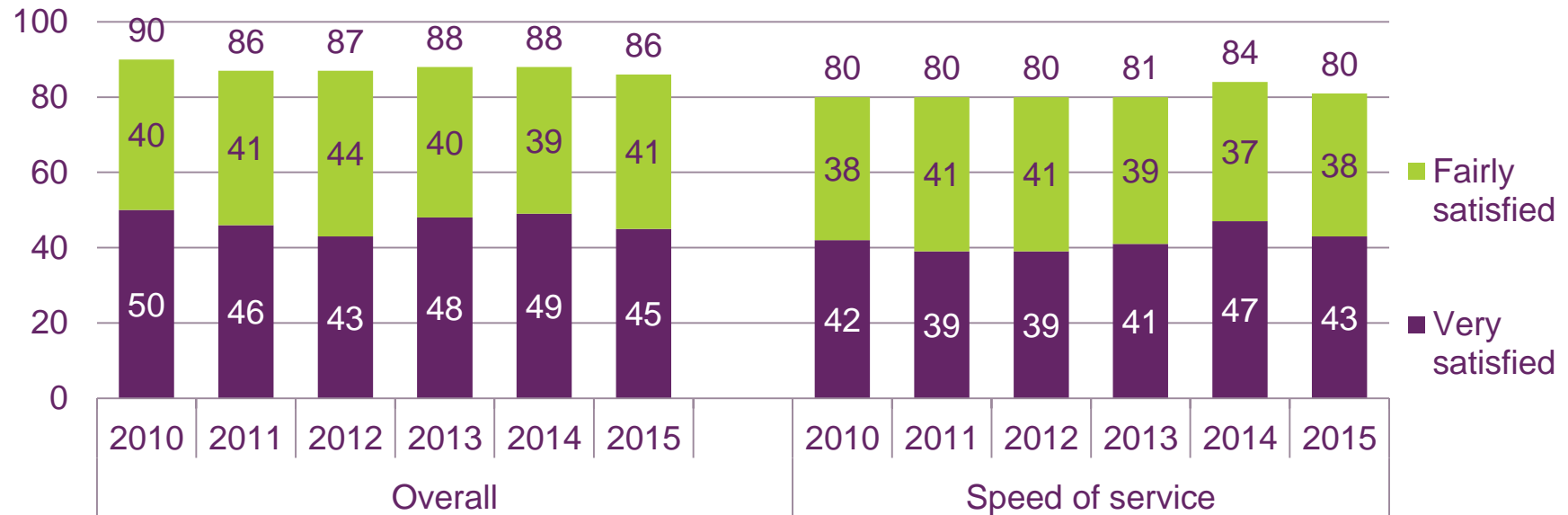
Base: All adults aged 16+ (3750 in 2013, 3740 in 2014, 3756 in 2015)

Note: It is likely that the fall in take up among 65-74s in 2013 was due to a sampling error.

# Figure 4.75

## Satisfaction with aspects of fixed broadband service

Proportion of adults with fixed broadband (per cent)



Source: Ofcom Technology Tracker. Data from Quarter 1 2009-2013, then wave 1 2014-2015

Base: All adults aged 16+ with a fixed broadband connection

Note: Includes only those who expressed an opinion.

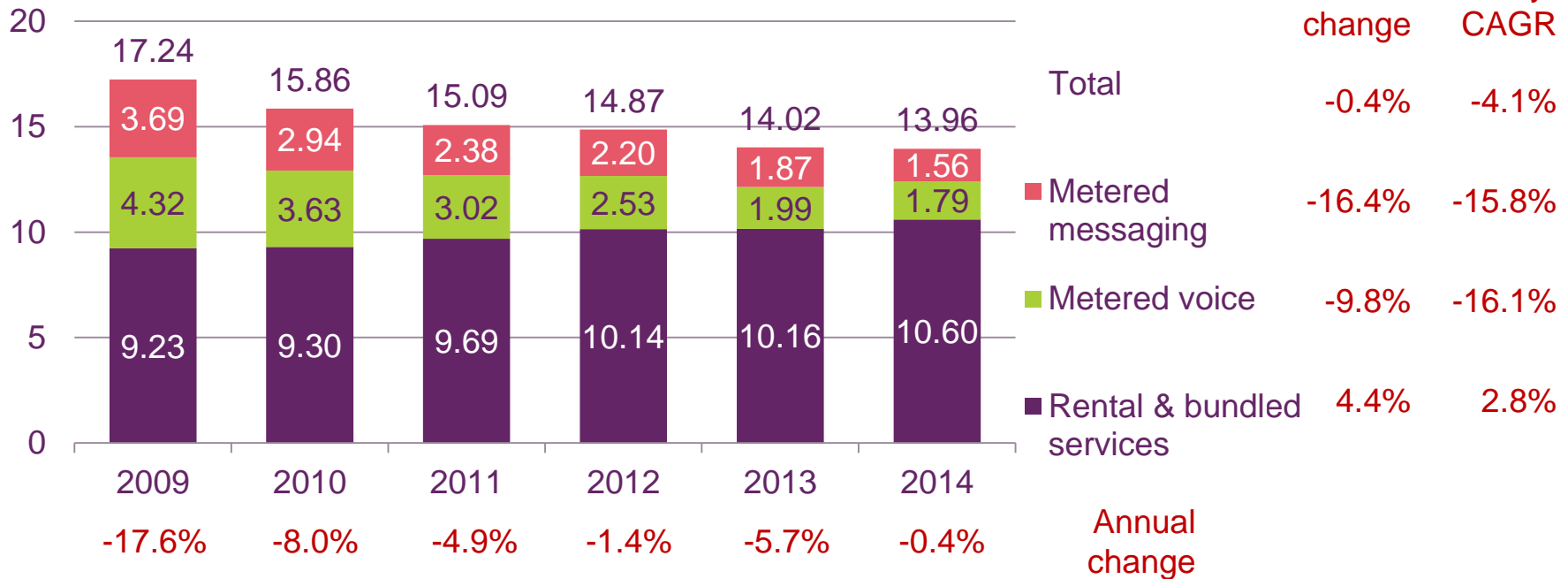
Q: Thinking about your fixed broadband internet service, please use this card to say how satisfied you are with your main supplier for... The overall service/ The speed of your service while online (not just the connection) provided by (main provider)?

# Mobile voice and data services

# Figure 4.76

## Real price of a basket of mobile services

£ per month (2014 prices)

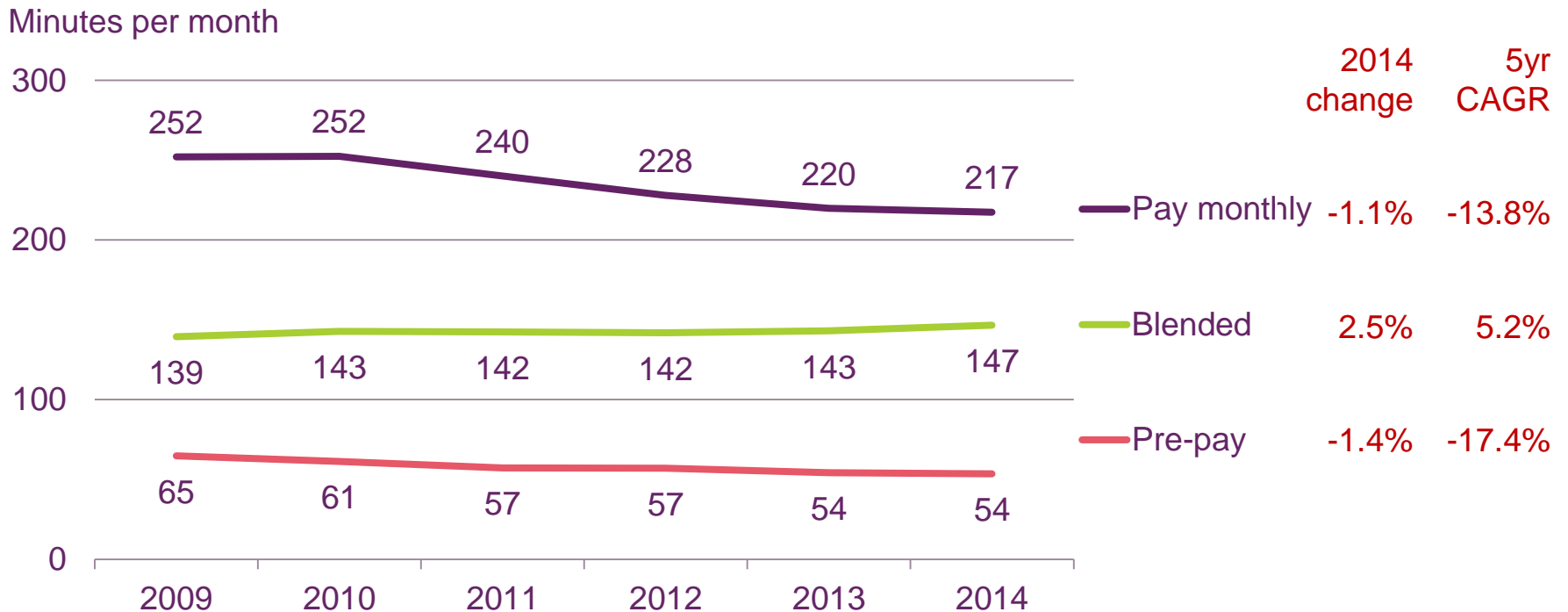


Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators; excludes non-geographic voice calls; adjusted for CPI; includes VAT.

## Figure 4.77

### Average monthly outbound mobile call minutes, by subscription type



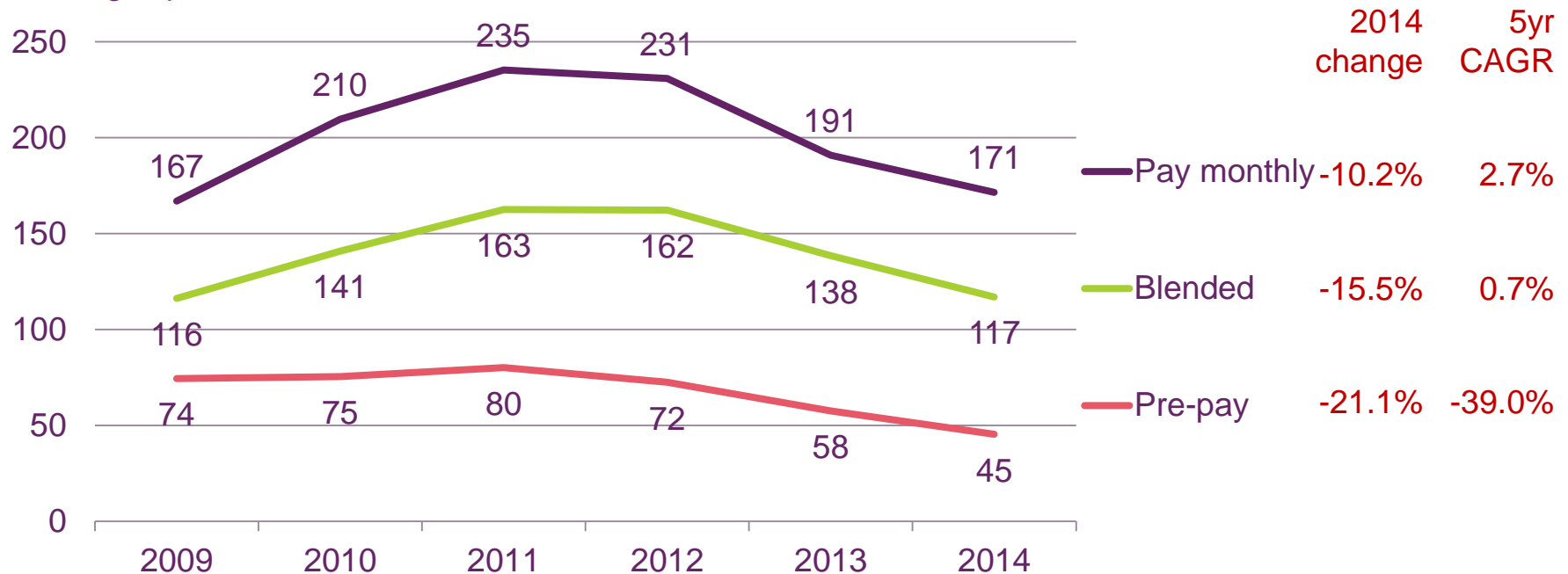
Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators.

## Figure 4.78

### Average monthly outbound mobile messages per subscriber, by subscription type

Messages per month



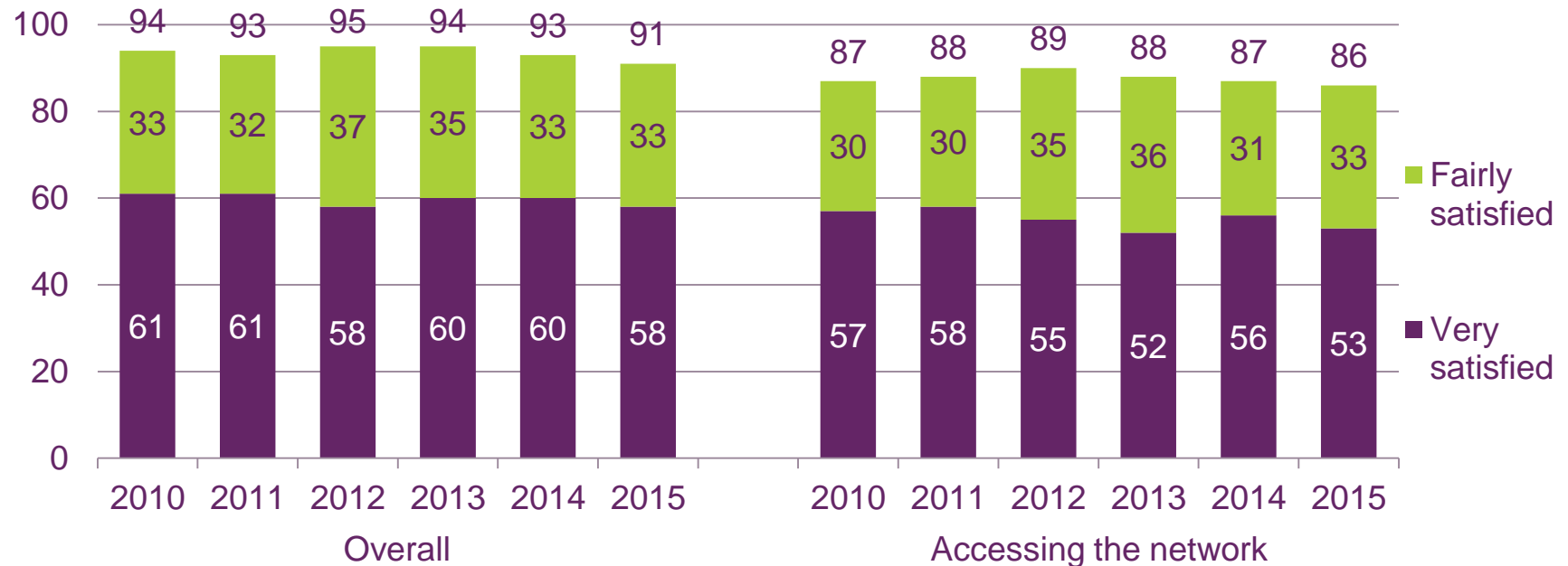
Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators.

# Figure 4.79

## Satisfaction with aspects of mobile service

Proportion of adults with service (per cent)



Source: Ofcom Technology Tracker. Data from Q 1 2009-2013, wave 1 2014-2015

Base: All adults aged 16+ with a mobile phone

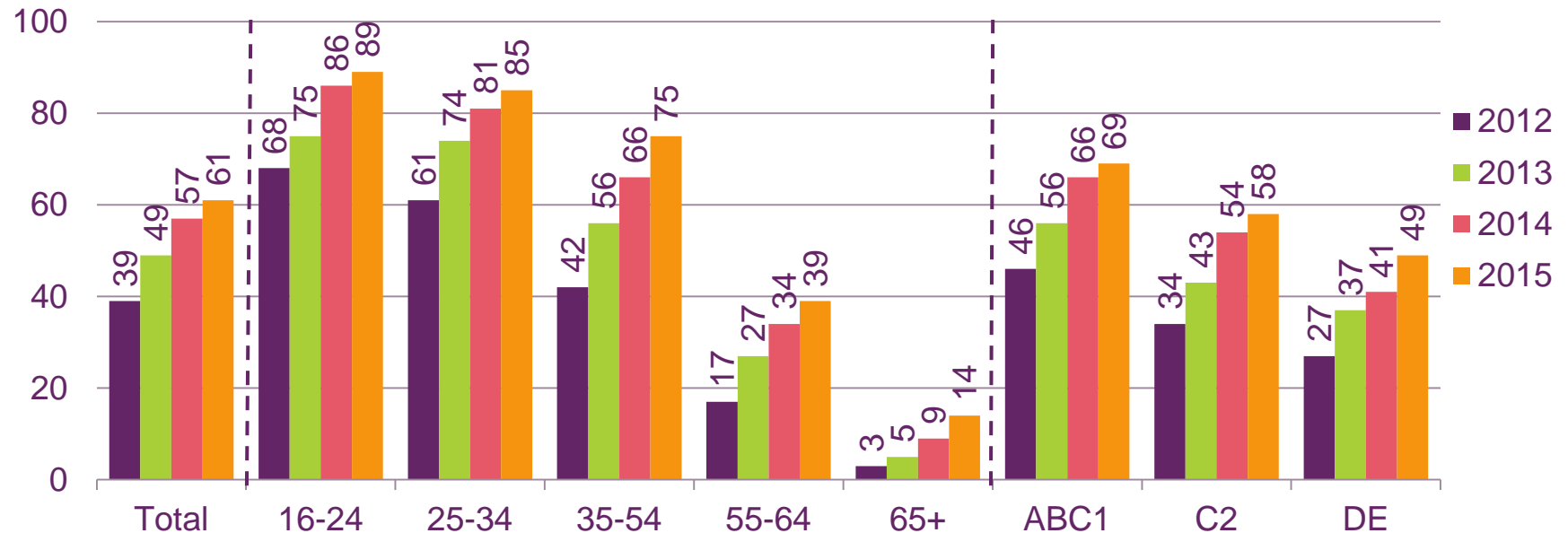
Note: Includes only those who expressed an opinion.

Q: Thinking about your mobile phone service, please use this card to say how satisfied you are with your main supplier for... The overall service/ Reception/ accessing network provided by (main provider)?

# Figure 4.80

## Use of data services on mobile phones, by age and socio-economic group

Proportion of adults (per cent)



Source: Ofcom Technology Tracker. Data from Q 1 2011-2013, wave 1 2014-2015

Base: All adults aged 16+ (2015 n=3756)

Note: Internet use includes accessing the internet, downloading and streaming content, connecting using WiFi and using VoIP.

QD28A: Which if any, of the following activities, other than making and receiving voice calls, do you use

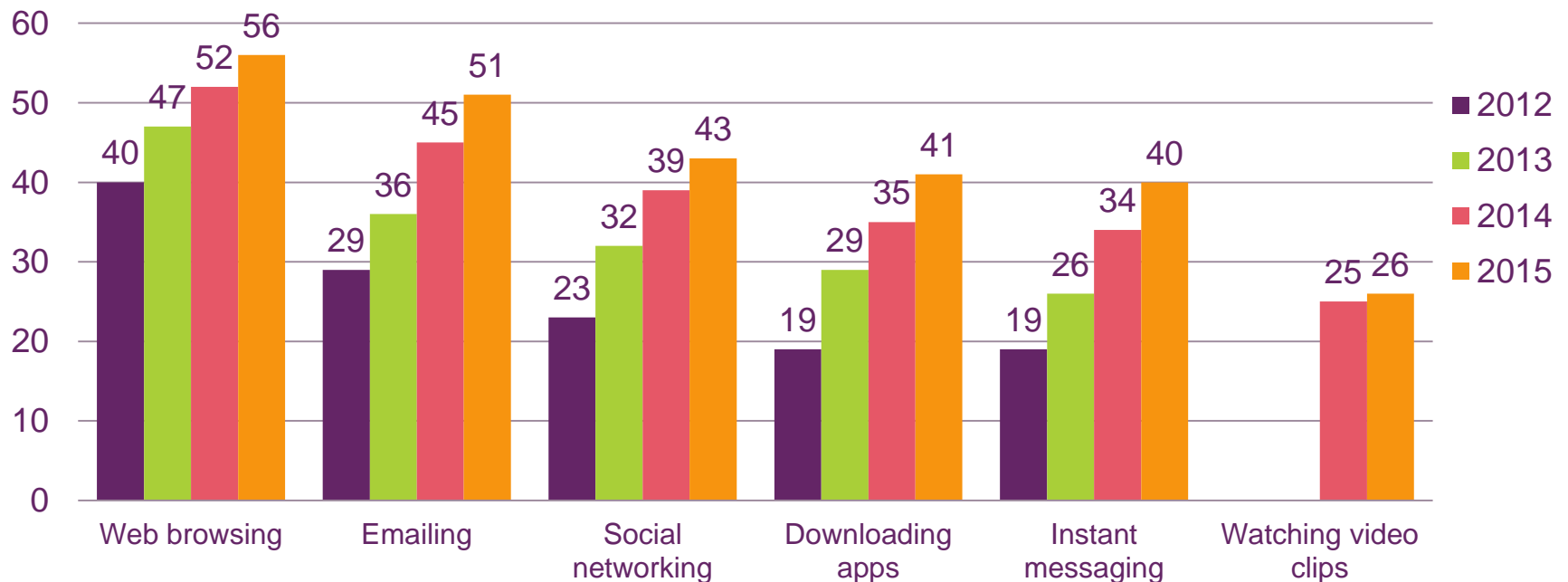
your mobile for?



# Figure 4.81

## Use of mobile data services among mobile users

Proportion of mobile users using service (per cent)



Source: Ofcom Technology Tracker. Data from Q 1 2012-2013, wave 1 2014-2015

Base: All mobile users aged 16+

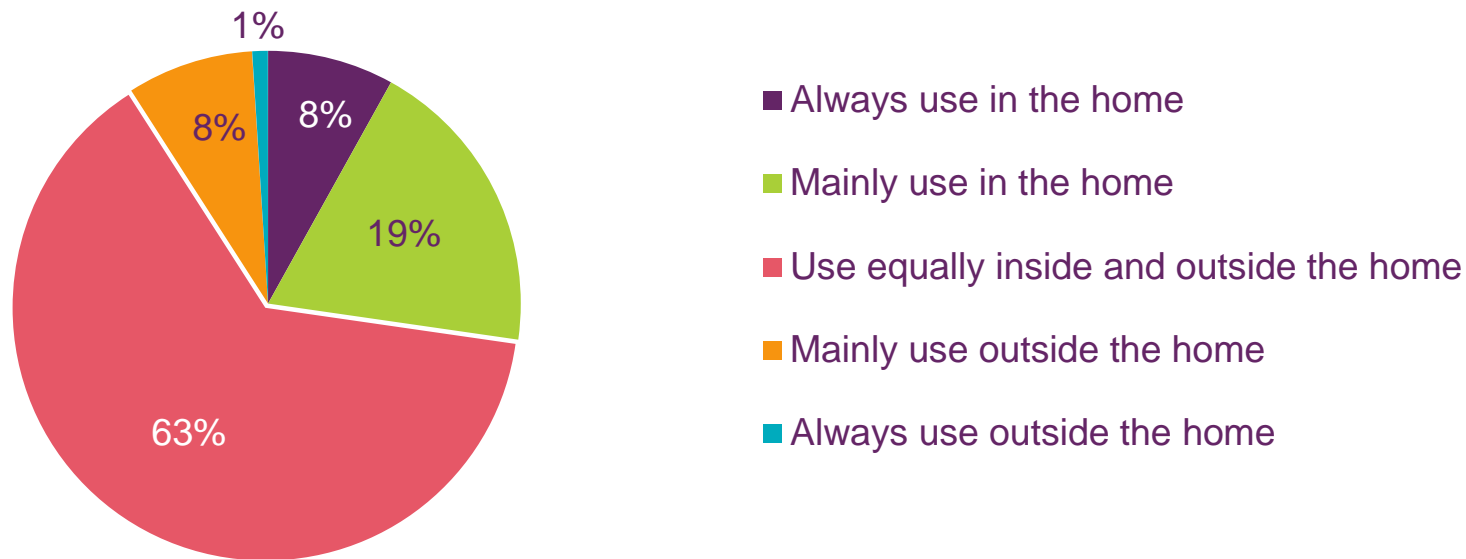
QD9A: Which if any of the following activities, other than making and receiving voice calls, do you use

your mobile for?

## Figure 4.82

### Location of internet access using a mobile handset

Proportion of mobile internet users (per cent)



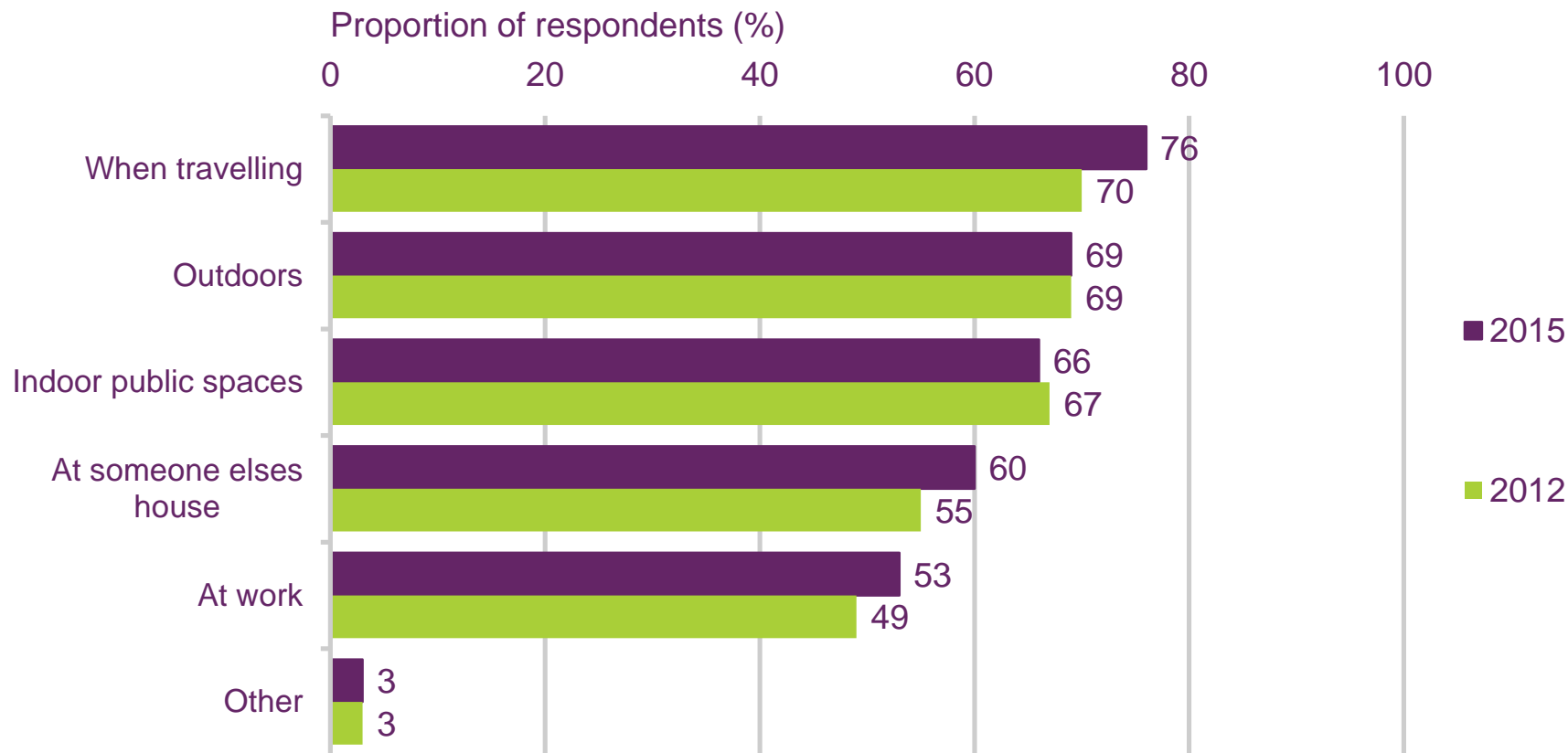
Source: Ofcom Technology Tracker, W1 2015

Base: All adults aged 16+ who access the internet on their mobile phone

QD15(QD28C): Which one of these best describes where you use your mobile phone to access the internet?

# Figure 4.83

## Location of mobile internet use outside the home



Source: Ofcom Technology Tracker, W1 2015

Base: All adults aged 16+ who use their mobile phone to access the internet outside the home

QD16 (QD28F). SHOWCARD In which of these places do you use your mobile phone to access the internet

outside of the home? Answers shown were first asked in 2012 survey