CMR10 telecoms slides

August 2010

UK Communications Market 2010: telecoms charts

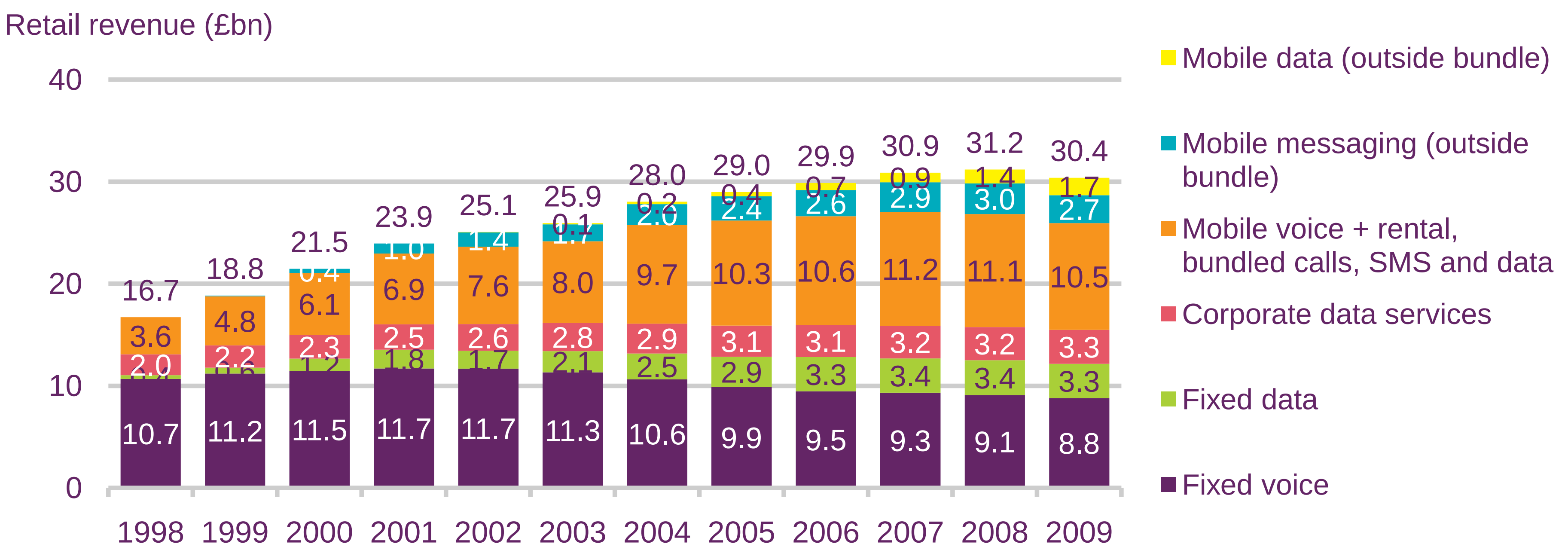
- Key market developments
- The telecoms industry
- The telecoms user

Figure 5.1 UK telecoms industry: key statistics

	2004	2005	2006	2007	2008	2009
Operator-reported retail revenue (£bn)	28.0	29.0	29.9	30.9	31.2	30.4
Operator-reported wholesale revenue (£bn)	9.3	9.6	10.1	10.4	10.5	10.2
Total operator-reported revenue (£bn)	37.3	38.6	40.0	41.3	41.7	40.6
Fixed voice call minutes (billions)	163	160	150	147	139	133
Mobile voice call minutes (billions)	64	71	82	100	111	118
Average monthly household telecoms spend (£)	71.1	71.4	69.4	67.0	64.5	62.1
Fixed access and call revenues (£bn)	10.6	9.9	9.5	9.3	9.1	8.8
BT share of fixed revenues (%)	58.8	56.9	54.7	53.9	52.4	49.8
Proportion of households connected to an unbundled exchange (%)	-	39.6	66.6	80.2	84.2	84.5
Fixed lines (millions)	34.5	34.0	33.6	33.5	33.2	32.1
Mobile retail revenues (£bn)	11.9	13.1	13.9	15.0	15.4	14.9
Active mobile connections per 100 population	99.9	109.2	115.9	121.8	126.3	131.7
Active 3G mobile connections per 100 population	4.3	7.7	12.8	20.6	30.3	41.8
Internet connections per 100 population	25.8	27.5	28.2	30.1	30.6	31.5

Figure 5.2

Operator-reported UK telecoms industry retail revenue

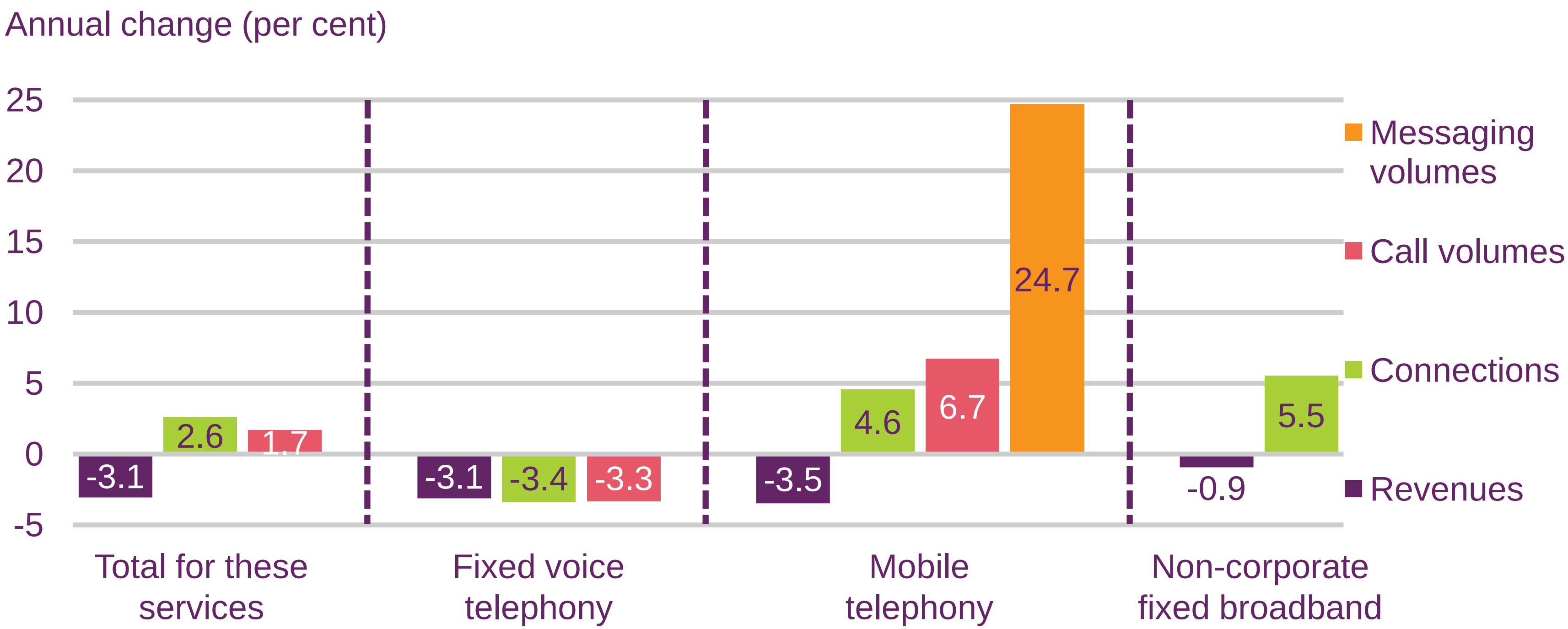


Source: Ofcom / operators / IDC

Note: The bundling of messaging and data services in with monthly rental tariffs mean that there will be an element of mobile data revenue included in mobile voice revenues

Figure 5.3

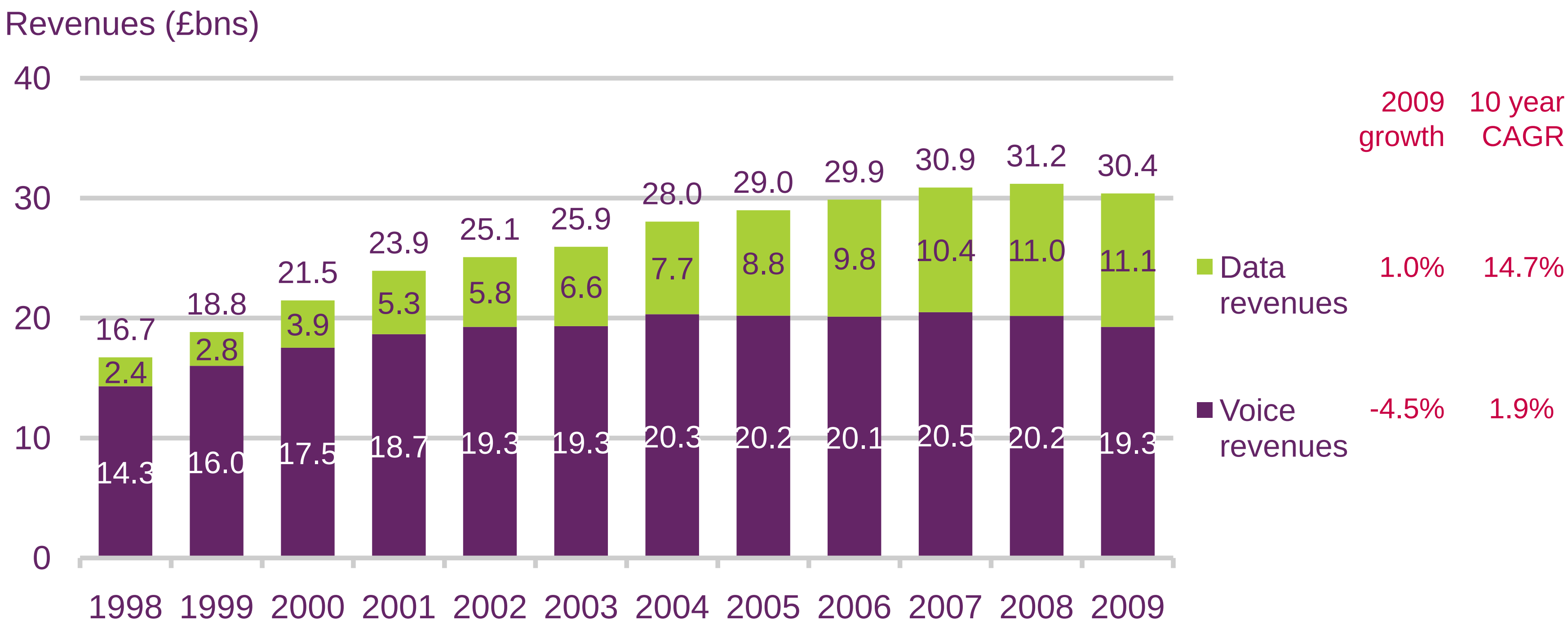
Growth in operator-reported telecoms retail revenues and usage in 2009



Source: Ofcom / operators

Figure 5.4

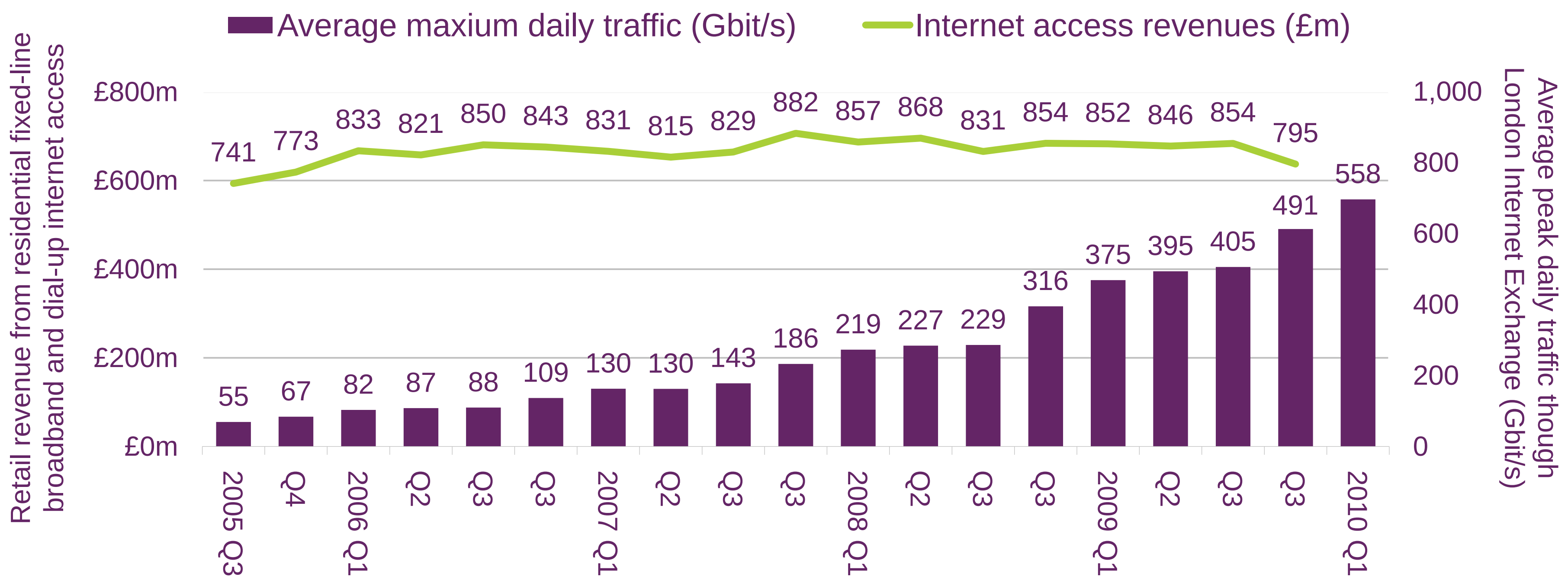
Voice and data operator-reported UK telecoms industry retail revenue



Source: Ofcom / operators

Figure 5.5

Internet access revenues and average peak daily data traffic flowing across London Internet Exchange (LINX) switches

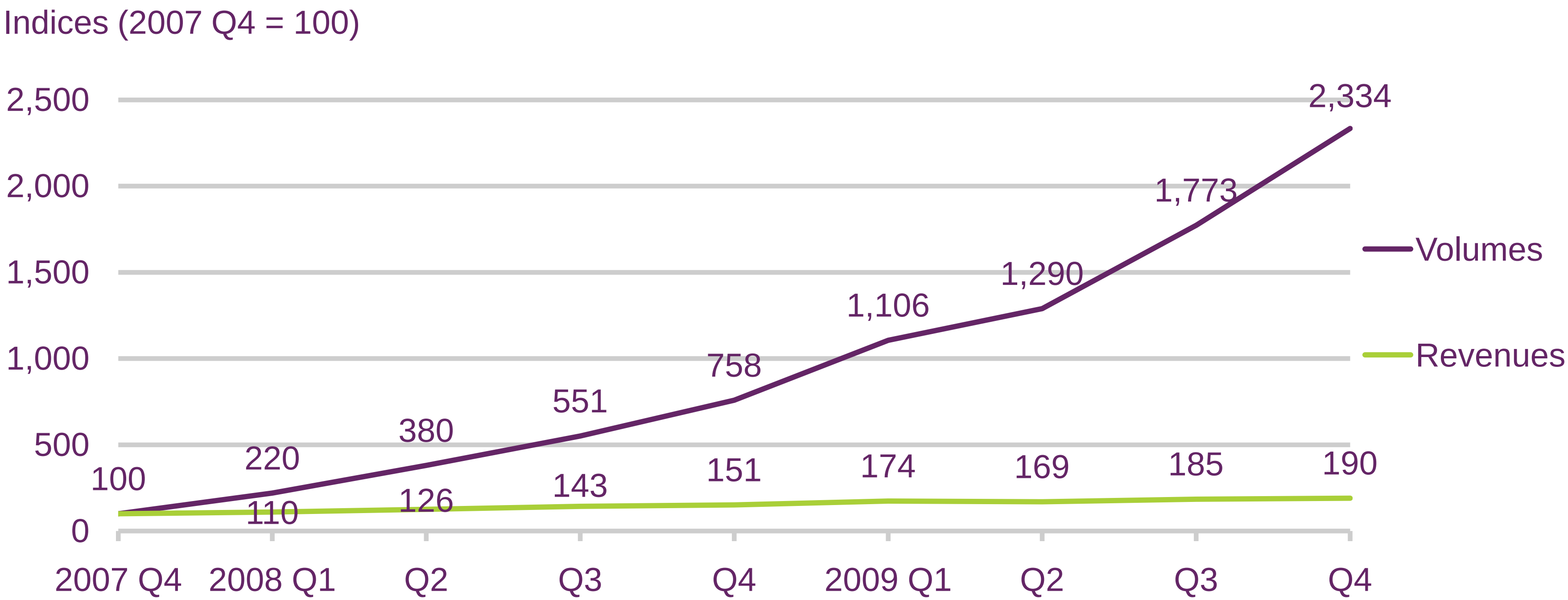


Source: Revenue data – Ofcom based on operator returns; Data traffic – LINX, https://www.linx.net/pubtools/trafficstats.html

Note: LINX traffic data represents the average of the five-minute daily peaks of aggregate traffic across each of the LINX members' ports; LINX data excludes private peering; revenue data is fixed-line internet access only and is not available for Q1 2010.

Figure 5.6

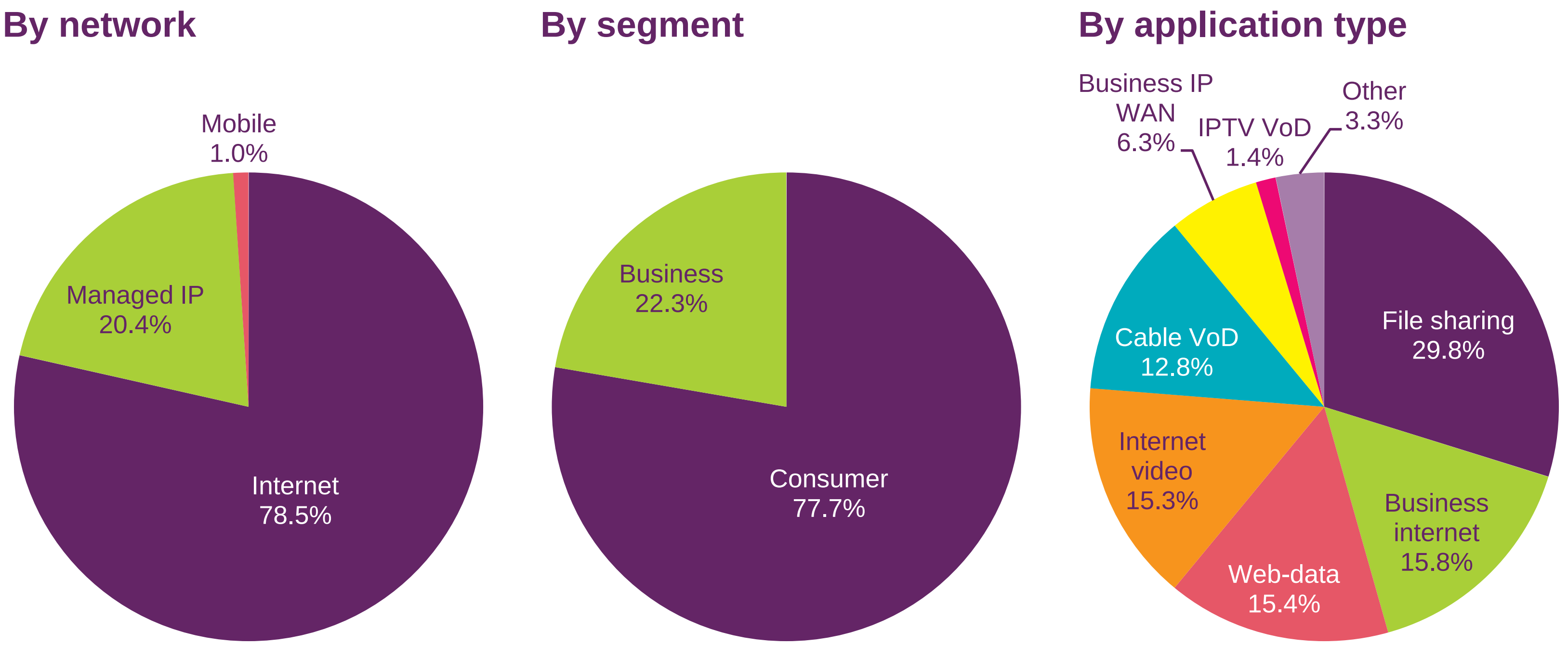
Mobile data volumes and revenues



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; data revenue is likely to be understated as it excludes any data element included within standard pay-monthly tariffs.

Figure 5.7

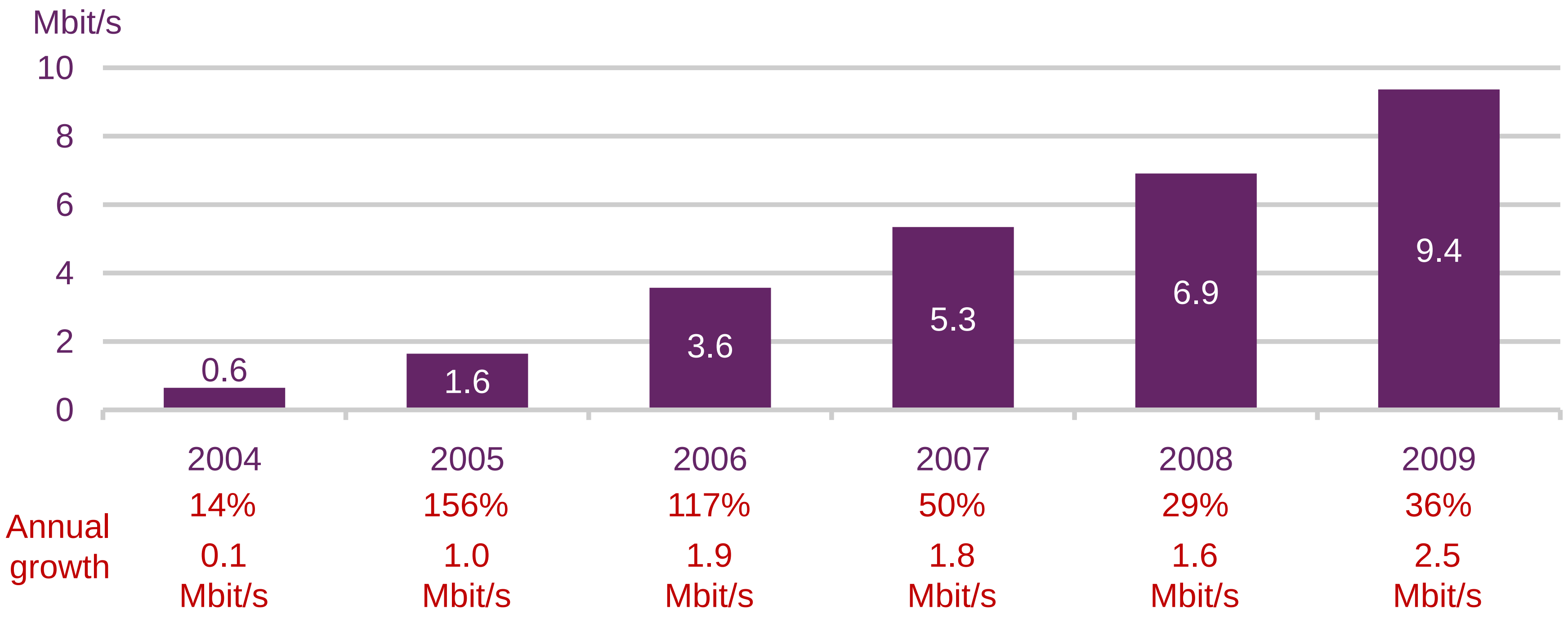
UK IP Traffic, 2009



Source: Cisco Visual Networking Index (VNI) Global IP Traffic Forecast, 2009-2014
Notes: The Cisco VNI forecast methodology rests on a foundation of analyst projections for internet users, broadband connections, video subscribers, mobile connections, and internet application adoption. Upon this foundation are layered Cisco's own estimates for application adoption, minutes of use, and kilobytes per minute based on Cisco VNI usage data (quantitative insights into current activity on service provider networks and qualitative samples of consumers' online behaviour) and other sources; other includes online gaming, mobile data and Internet-video-to-TV

Figure 5.8

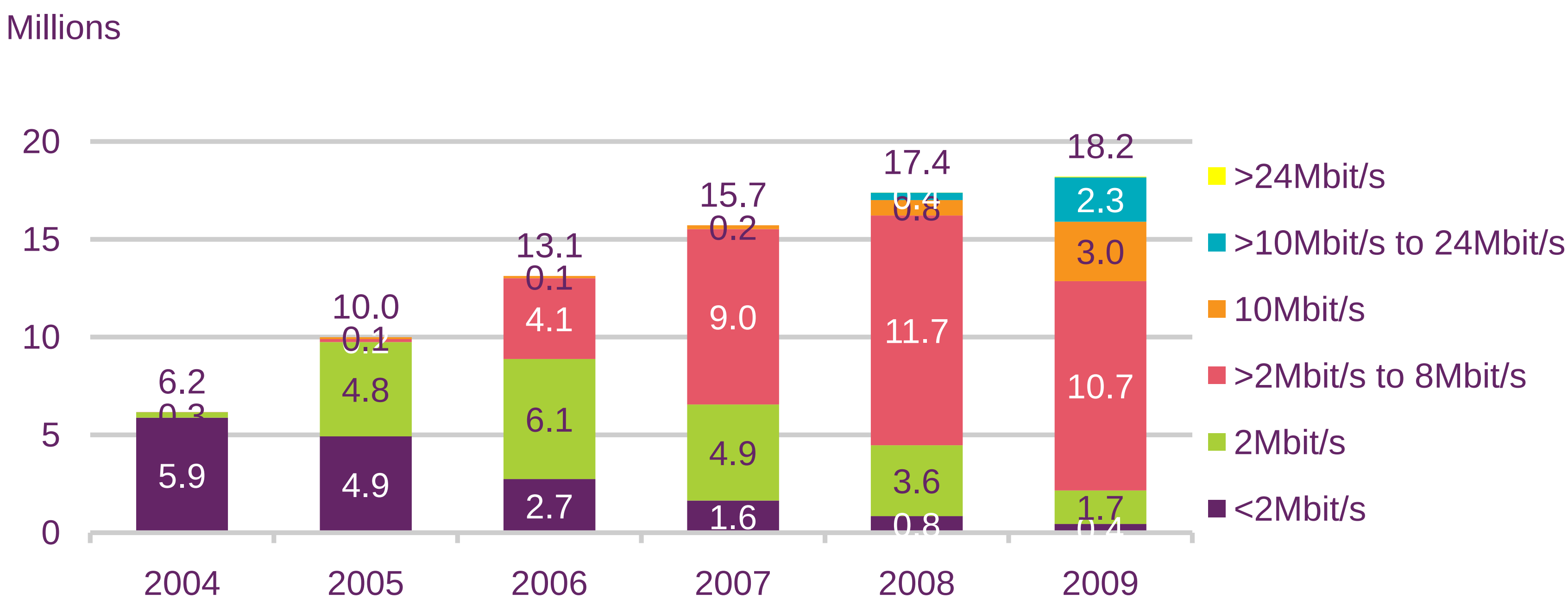
Average non-corporate fixed broadband connection headline speeds



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes mobile broadband connections

Figure 5.9

Non-corporate broadband connections by headline speed

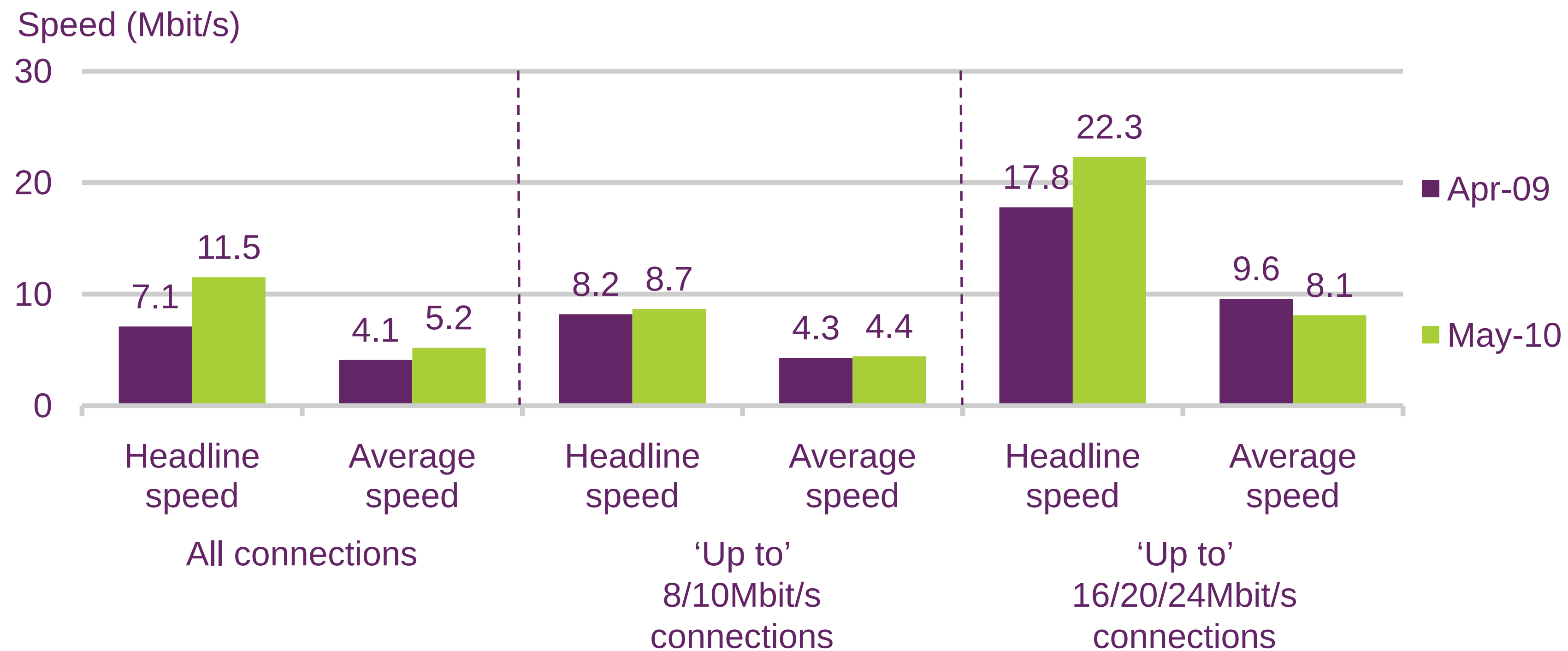


Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators; excludes mobile broadband connections

Figure 5.10

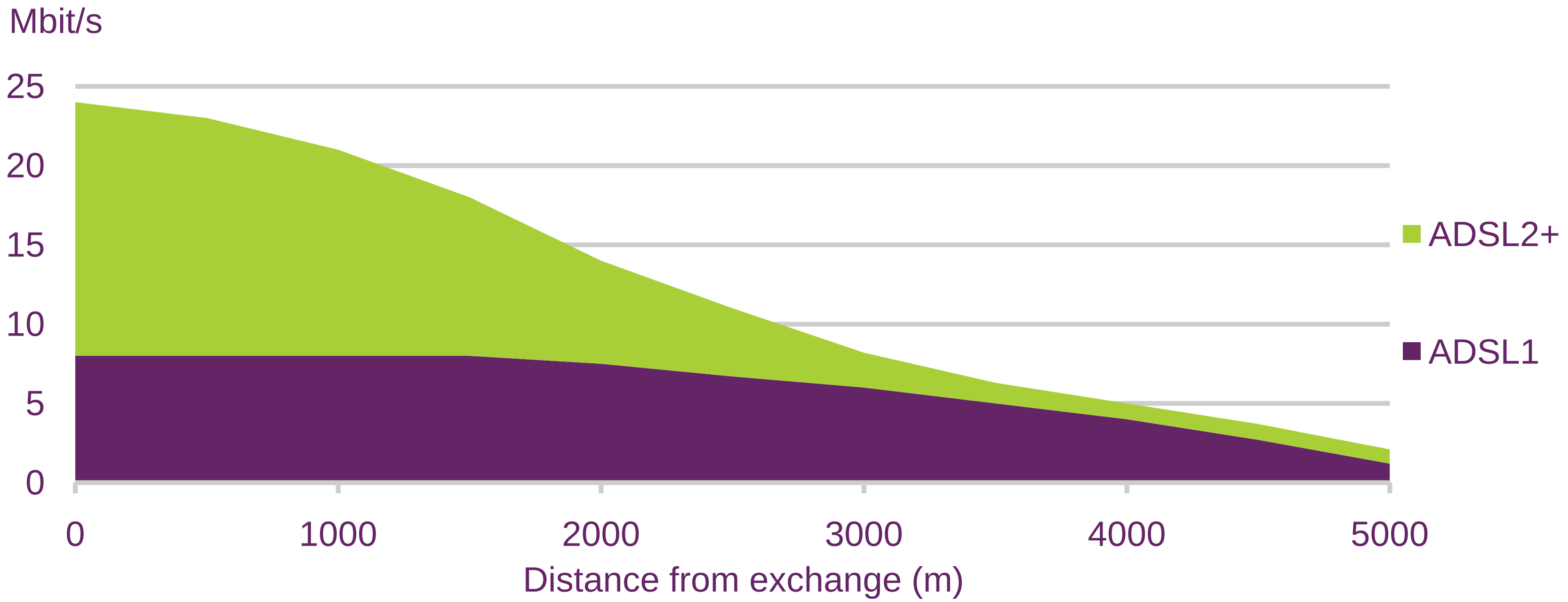
Average headline and actual broadband speeds, April 2009 and May 2010



Source: SamKnows measurement data for all panel members with a connection in May 2010
Panel Base: 1506 Notes: (1) Data have been weighted by ISP package and LLU/non-LLU connections, Rural/Urban, Geographic Market classification and distance from exchange to ensure that they are representative of UK residential broadband consumers as a whole; (2) As sufficient sample sizes were not available for consumers on packages of 'up to' 2Mbit/s or less, data collected for these packages in April 2009 has been factored in, in proportion to share of all connections in May 2010; (3) Data collected from single-thread download speed tests

Figure 5.11

Theoretical maximum DSL speeds by length of line from exchange to premises



Source: http://www.tpg.com.au/dslam/faq.php

Figure 5.12 Selected UK NGA projects

Operator	Project locations	Technology	Coverage	Estimated connections June 2010
Atlas Communications	Middletown, Northern Ireland	FTTC	150 homes	50
BT	Various locations across the UK	FTTC	1.5 million homes passed by July 2010, 40% of the UK population by 2012 and 66% by 2015	Ipswich - 50, Muswell Hill - 6,000, enabled exchange areas - 6,000, Ebbsfleet - 100
Fibrecity Holdings	Bournemouth and Dundee	FTTP	88,000 homes passed in Bournemouth and 70,000 premises including 55,000 homes in Dundee (networks planned in Derby, Halton, Nottingham, Plymouth and York)	350
Independent Fibre Networks (IFNL)	Corby, Swindon and Andover	FTTP	6,000 homes passed in Corby, 835 in Swindon and 2,500 in Andover	350
Isrighthere	Liverpool, Leeds and Chelsea	FTTP	498 apartments and 160 retail units passed in Liverpool and 166 residential apsrtments in Leeds (plus 55 apartments to be passed in Chelsea)	719
Rutland Telecom	Lyddington, Rutland	FTTC	Between 180 and 200 homes passed in Lyddington	50

Figure 5.13

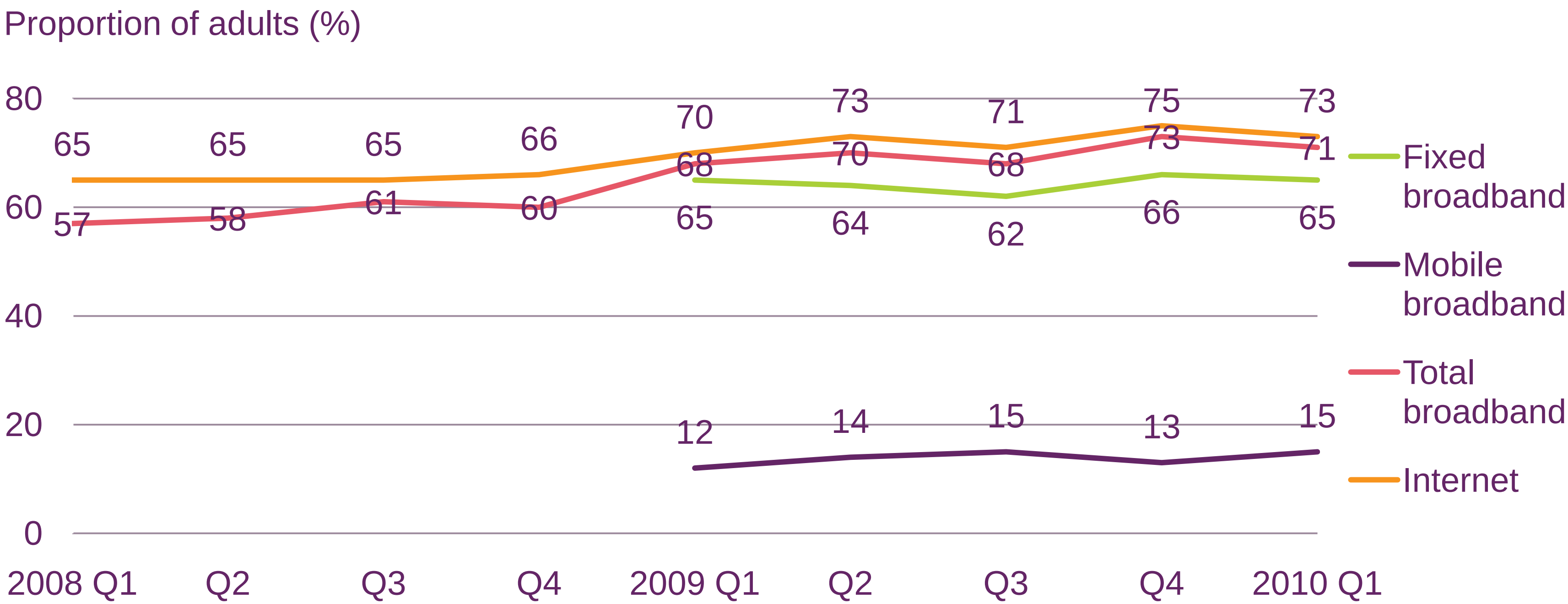
Selected super-fast broadband tariffs

	BT Infinity Option 1	BT Infinity Option 2	Virgin Media Broadband XXL	Velocity (Bournemouth)
Headline monthly charge	£19.99 (plus landline rental)	£24.99 (plus landline rental)	£38 (£28 with a landline)	£19.99
Headline speed (‘up to’)	40Mbit/s	40Mbit/s	50Mbit/s	100Mbit/s
Monthly data allowance	20GB	Unlimited	Unlimited	Unlimited
Contract length	18 months	18 months	12 months	12 months
Activation fee	£50	£0	£20	£50

Source: Ofcom

Figure 5.14

Household penetration of broadband

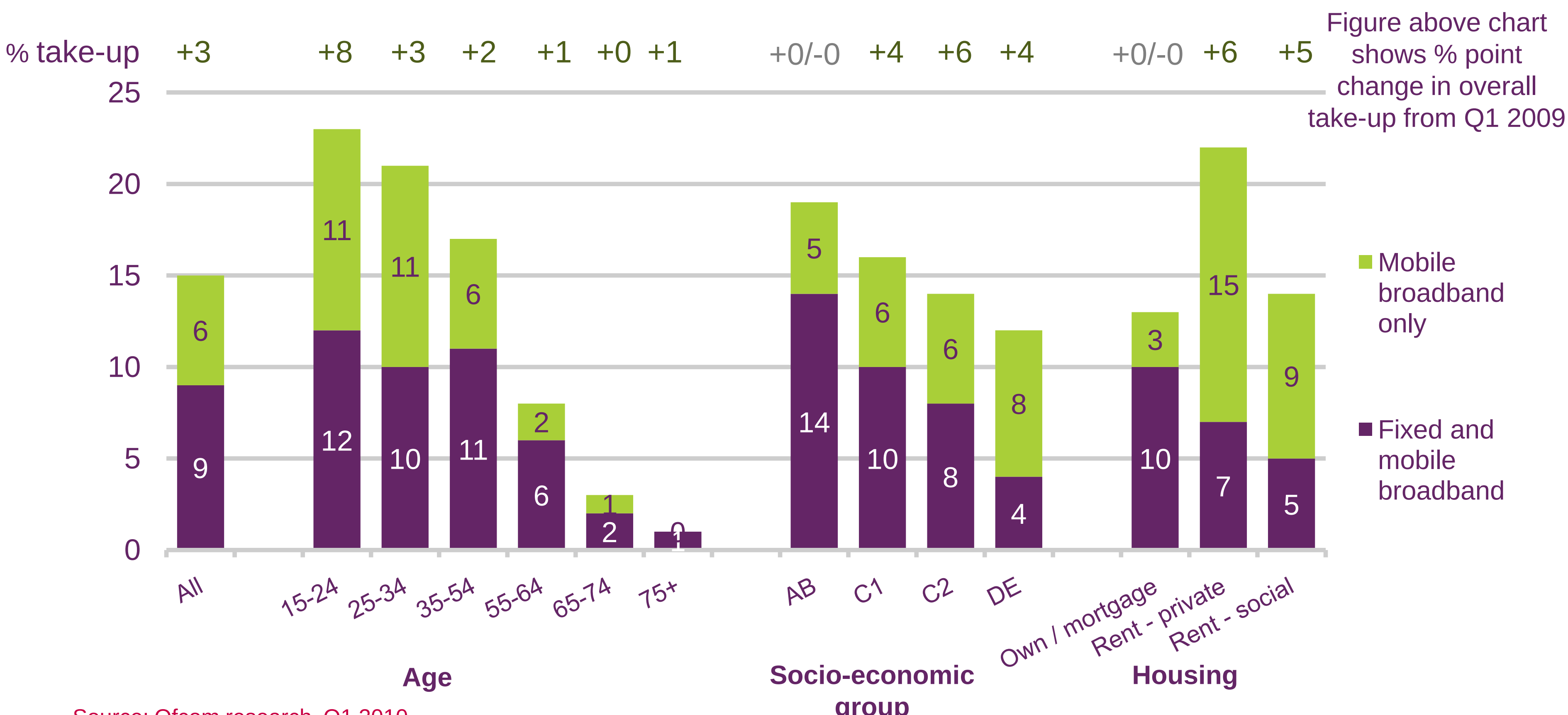


Source: Ofcom

Note: Data covering household penetration of fixed and mobile broadband is not available for 2008; error margins on this data are +/- 1% at the 95% confidence interval.

Figure 5.15

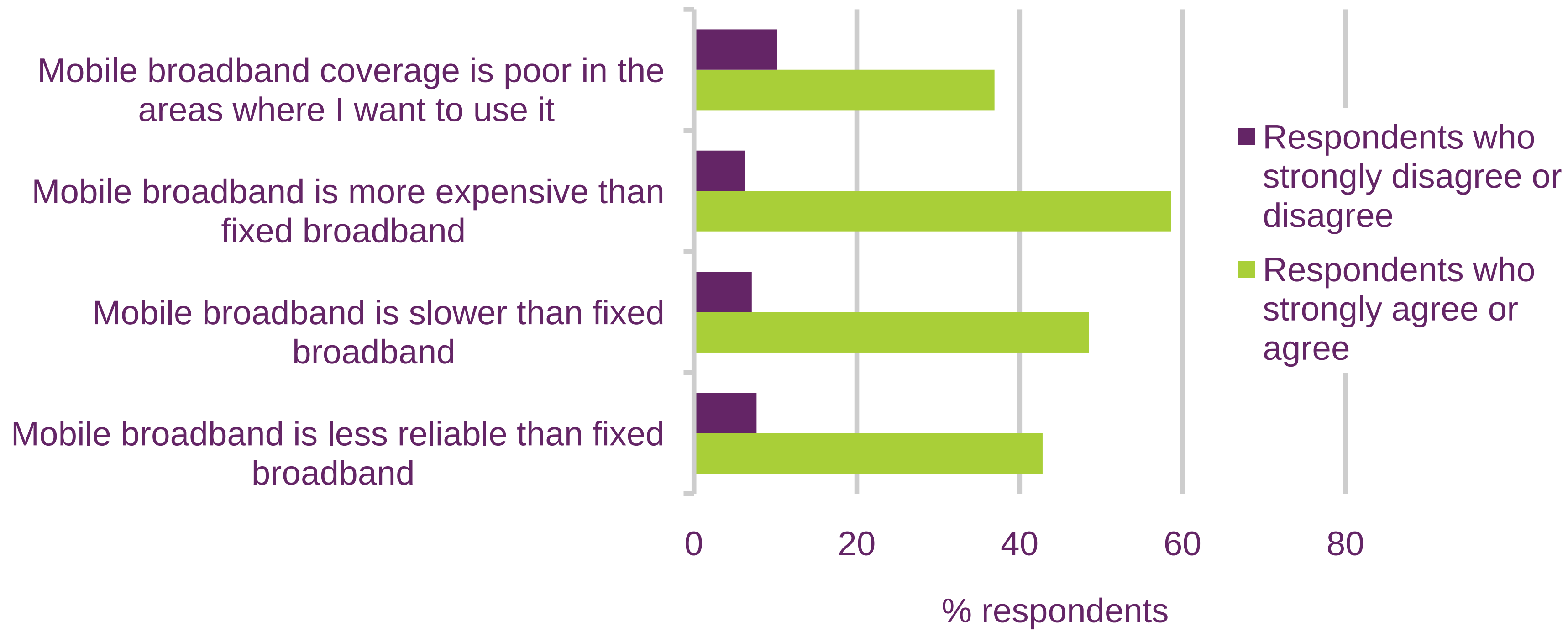
Take-up of mobile broadband, by socio-economic group



Source: Ofcom research, Q1 2010
Base: All adults aged 15+ (n=9013)

Figure 5.16

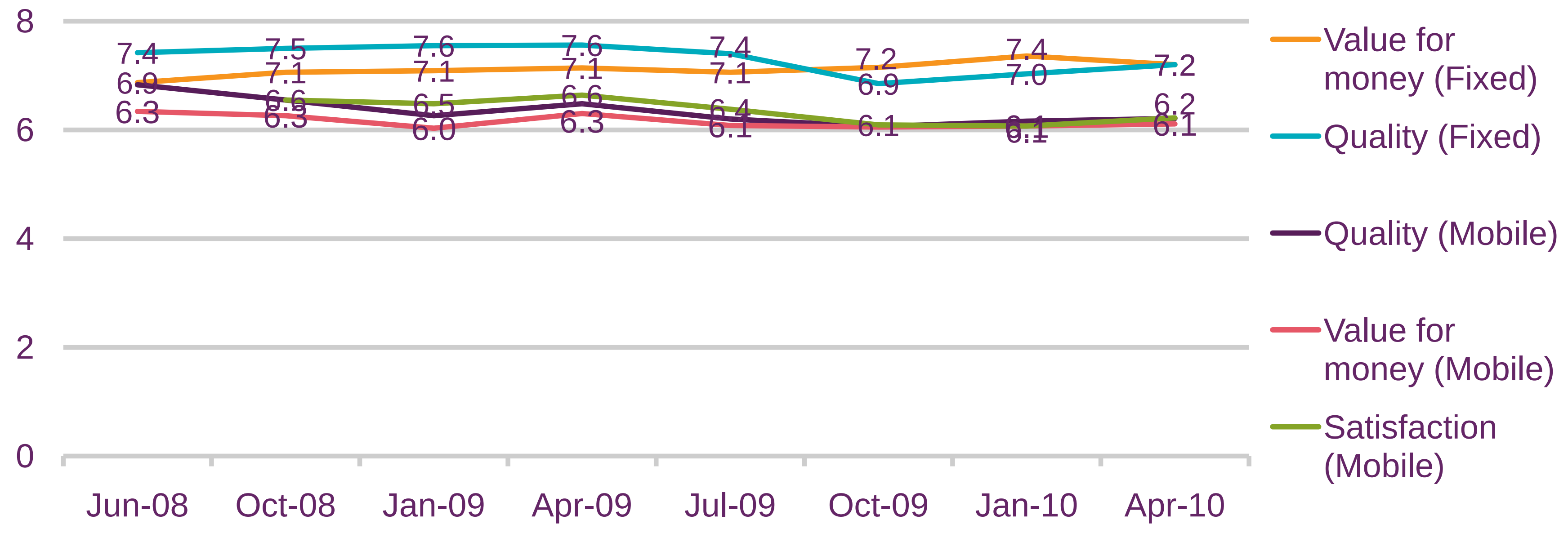
Attitudes towards mobile broadband in the UK



Source:YouGov
Question: ‘How far do you agree or disagree with the following statement’ n = 1024

Figure 5.17

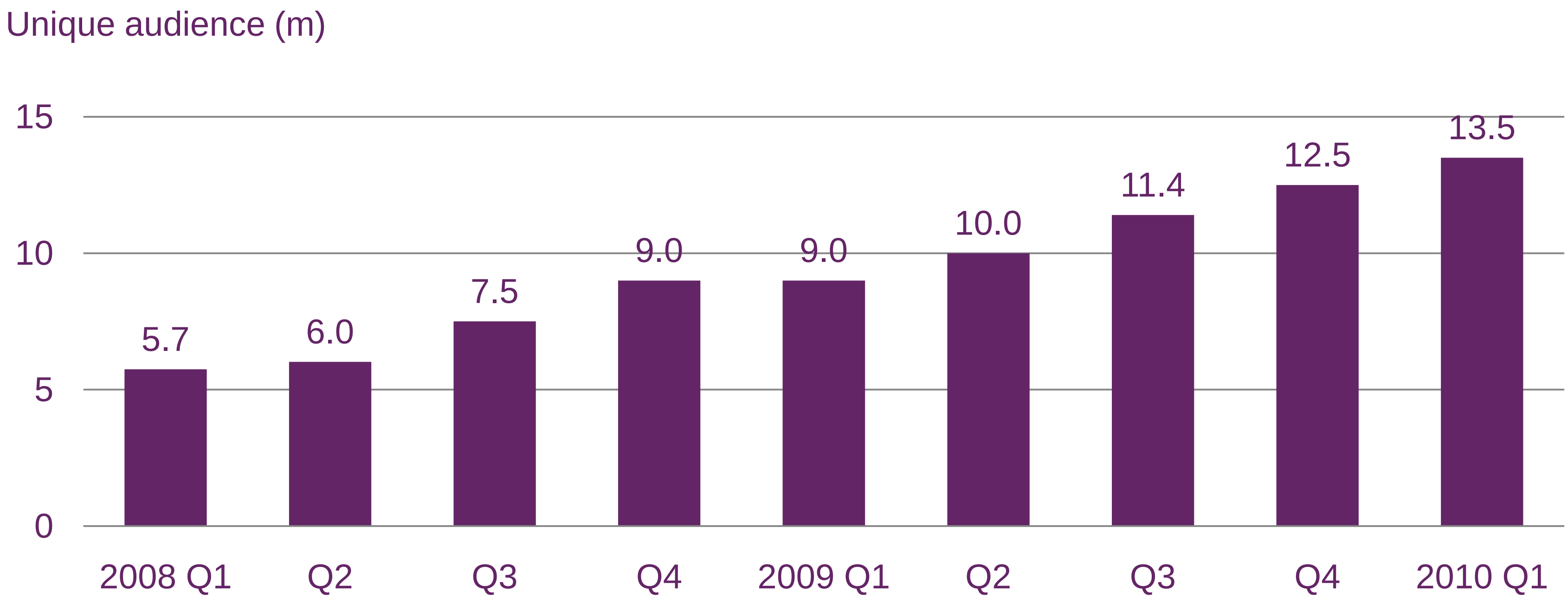
Mobile broadband customer indicators



Source:YouGov
Base: All mobile broadband respondents who rated their mobile broadband operator and all respondents that had a fixed broadband provider.
Q. Using a scale of 1 to 10 where 1 is very poor and 10 is excellent, how would you rate internet access from your provider?

Figure 5.18

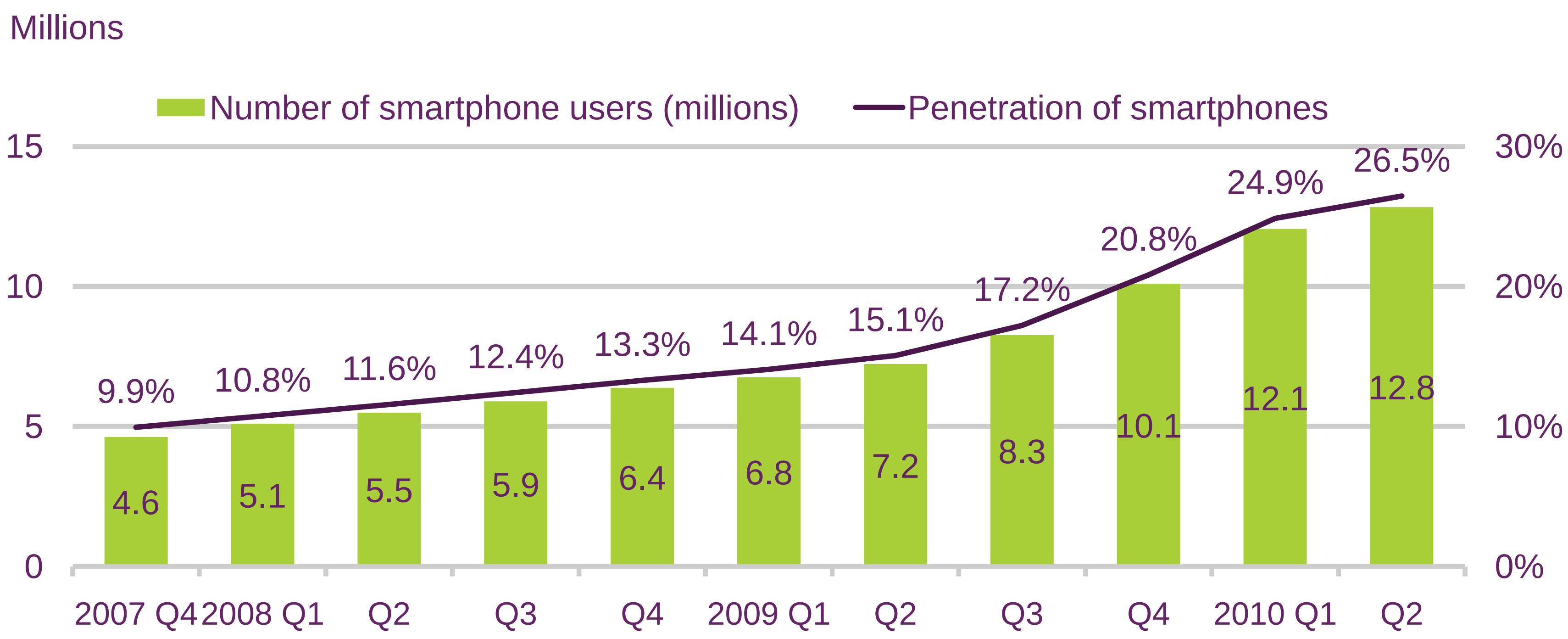
Number of people in the UK using the internet on mobile phones



Source: The Nielsen Company
Note: The figure reflects the number of people (aged 15+) who declare having visited any site on the internet on their mobile phone in the past 30 days

Figure 5.19

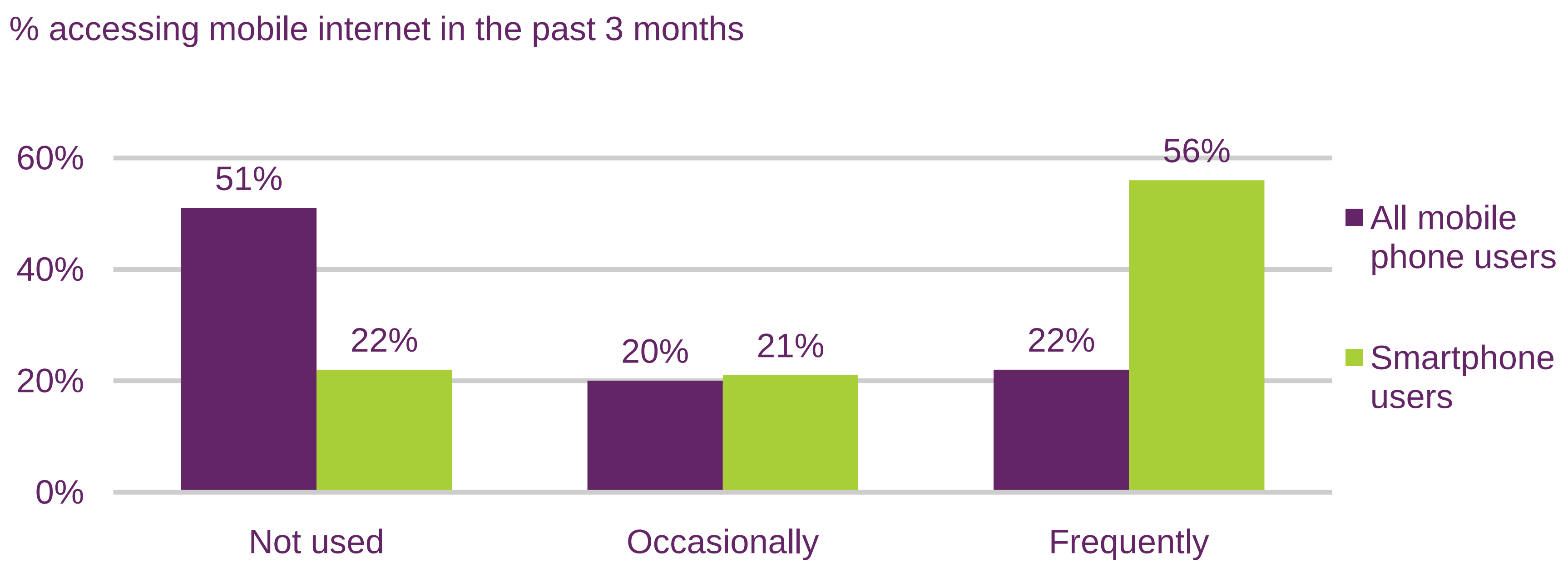
Number of smartphone users and penetration of smartphones in the UK



Source: comScore, Mobilens, December 2007 - May 2010

Figure 5.20

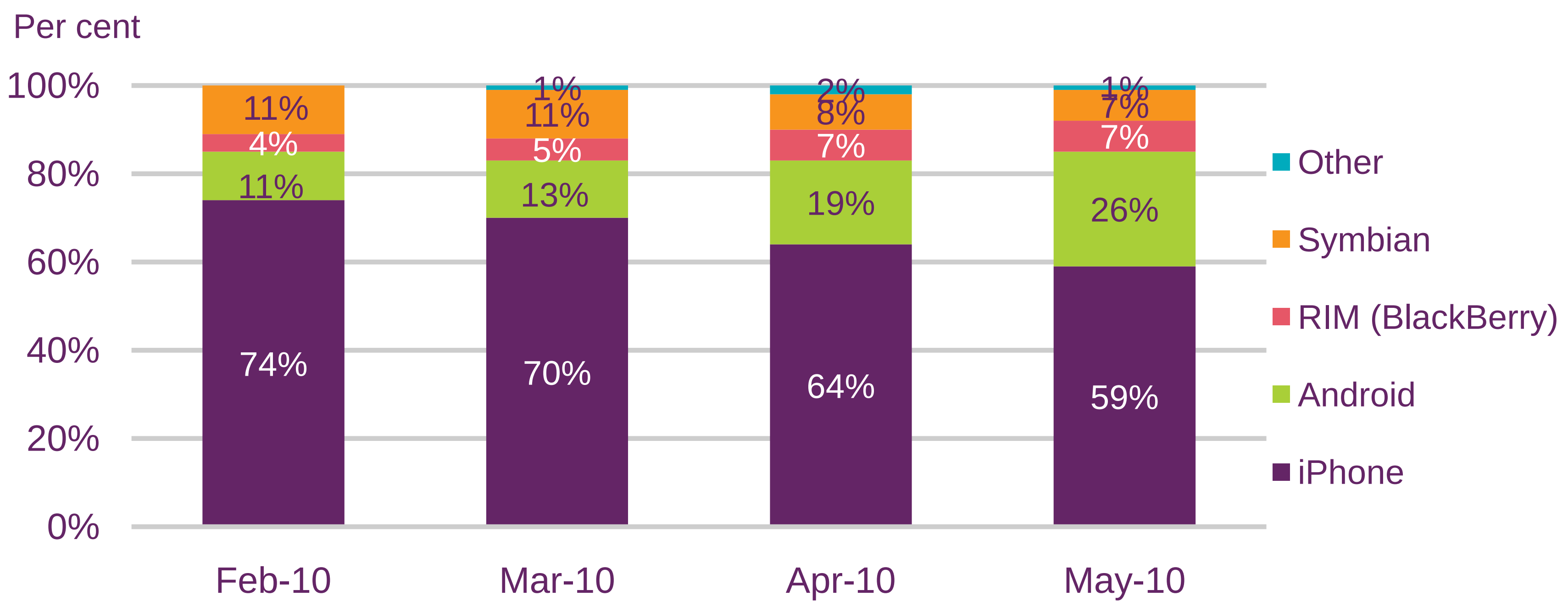
UK phone users accessing mobile internet, by handset type



Source: IPSOS MediaCT, based on an online survey carried out in November 2009 among a representative sample of 500 general mobile consumers aged 16-50

Figure 5.21

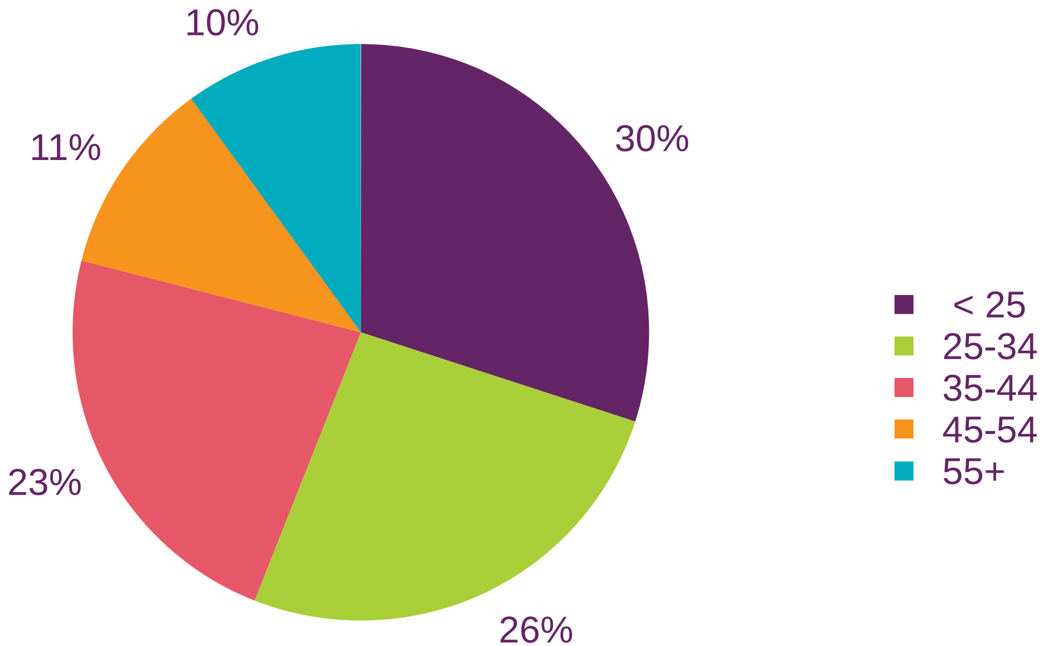
Mobile internet traffic volumes: share of requests, by mobile operating system



Source: Admob, May 2010, http://metrics.admob.com/2010/06/may-2010-country-data/

Figure 5.22

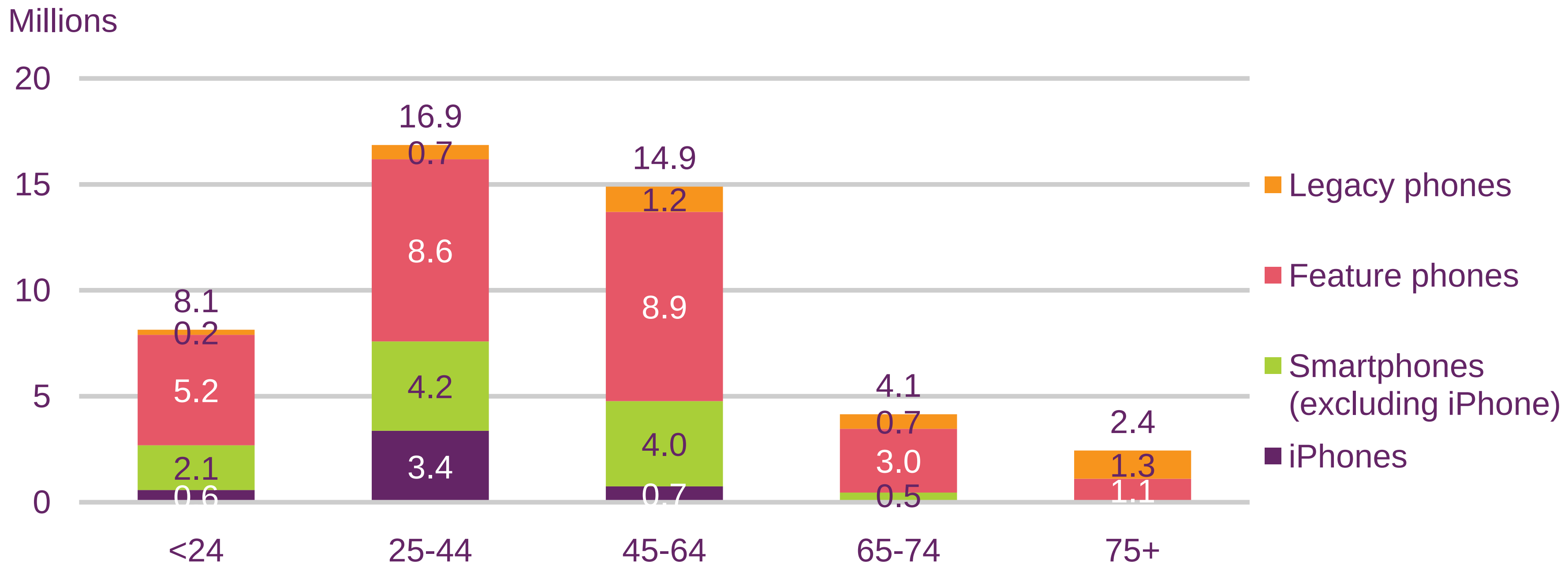
The majority of mobile internet users are under 35



Source: MobileSQUARED (2010)

Figure 5.23

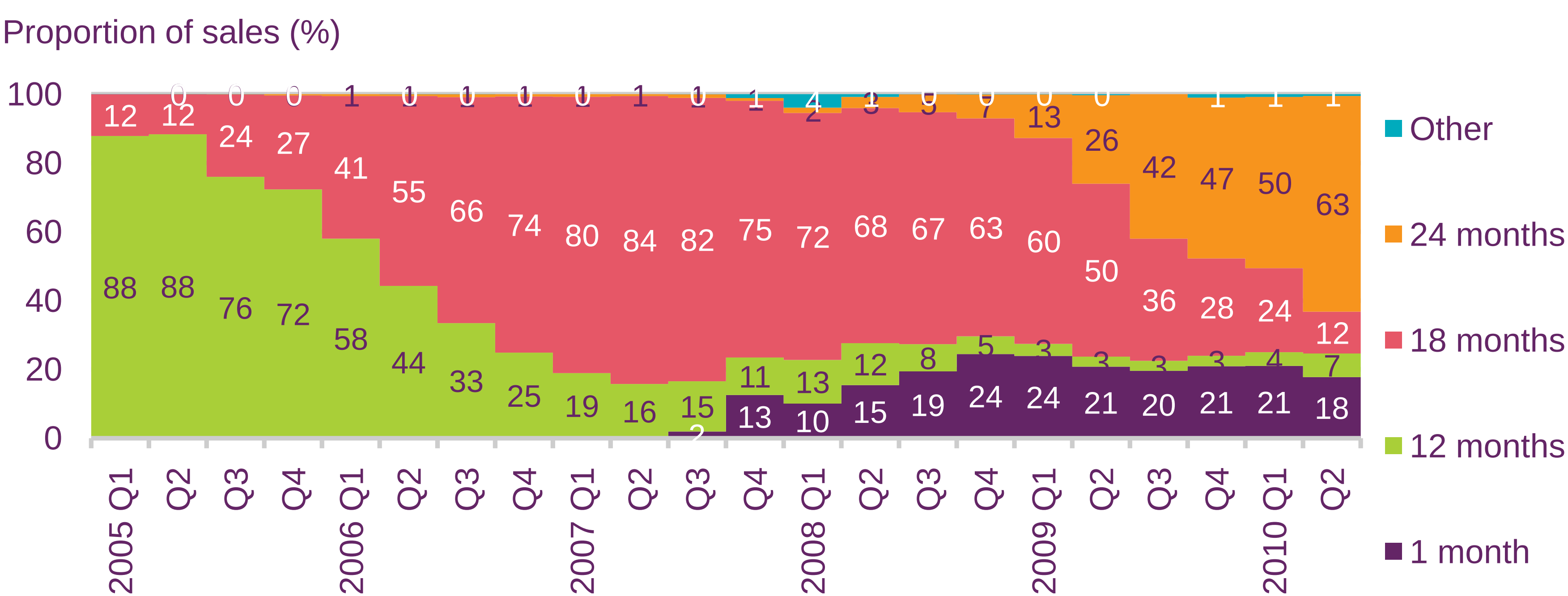
Type of handset used, by age



Source : MobileSQUARED

Figure 5.24

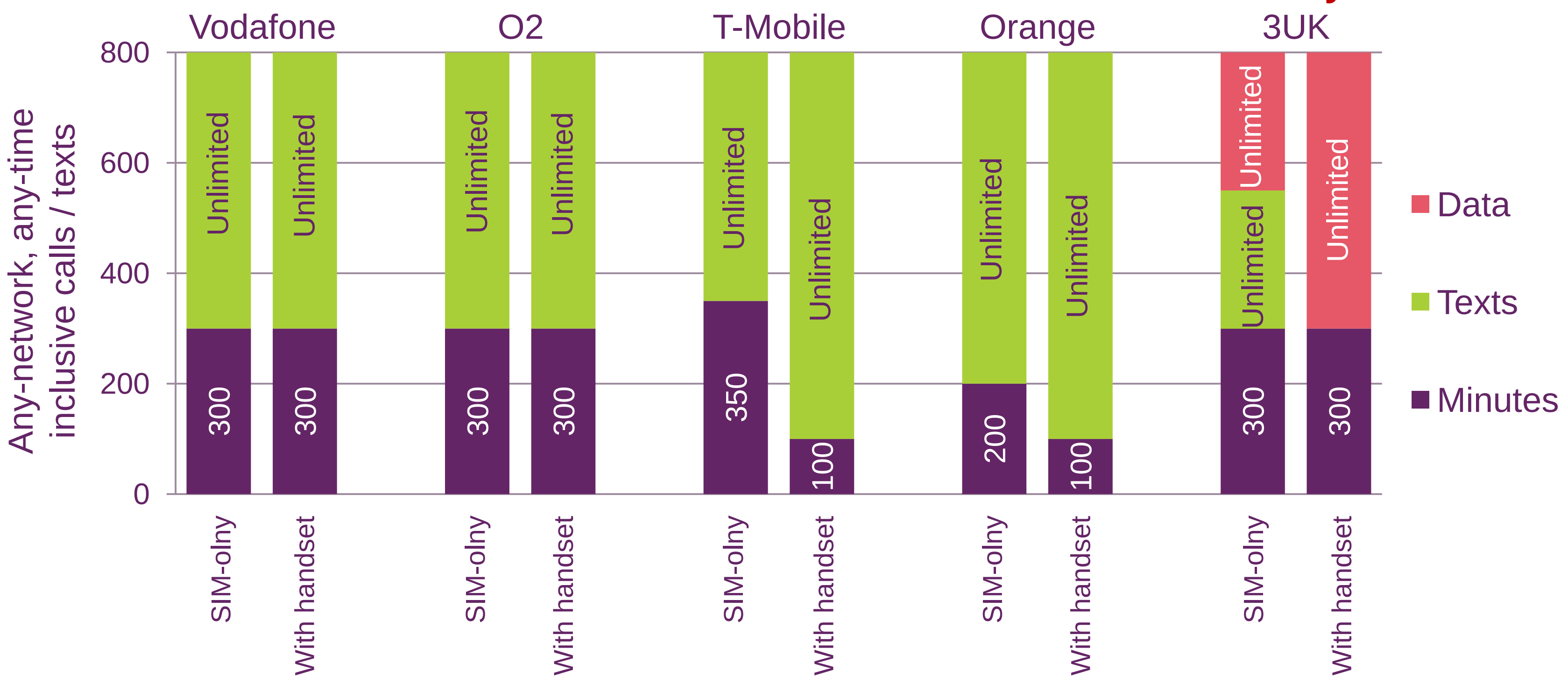
Contract lengths for new mobile connections



Source: GfK Retail and Technology UK Ltd, Contract Length Sales of new Mobile Connections, Q1 2005-Q2 2010.
Notes: England, Scotland and Wales only (excludes Northern Ireland); based on GfK's coverage of 94% of the consumer market; based on new post-pay connections; excludes contract renewals; only represents sales through consumer channels (i.e. most business connections are excluded)

Figure 5.25

Inclusive any-network, any-time allowances in £15 SIM-only 30-day contracts, and £15 handset-inclusive 24-month contracts, July 2010

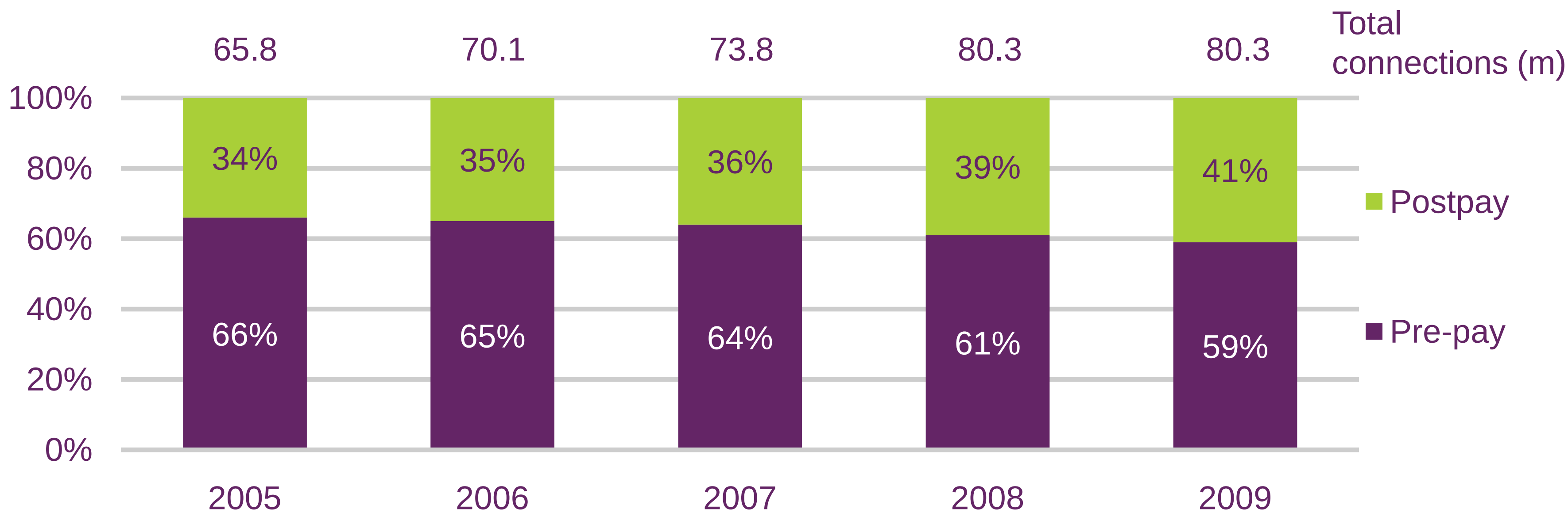


Source: Ofcom/tariff data from Pure Pricing/Operator websites

Notes: Data based on tariffs available in July 2010; standard tariff with basic handset selected which offers highest number of anytime, any-network minutes and texts for £15 where available on an 24-month contract ; SIM-only one-month tariff selected with highest number of anytime minutes at £15; this table is indicative of inclusive anytime, any network minutes only (and texts when they are additional to the maximum number of minutes) and should not be used to compare overall pricing as many additional factors are excluded, such as handset included, on-net calls, off-net calls, off-peak calls, data bundles and metered pricing

Figure 5.26

Market share of post-pay and pre-pay subscriptions



Source: End-year data provided to Ofcom by operators

UK Communications Market 2010: telecoms charts

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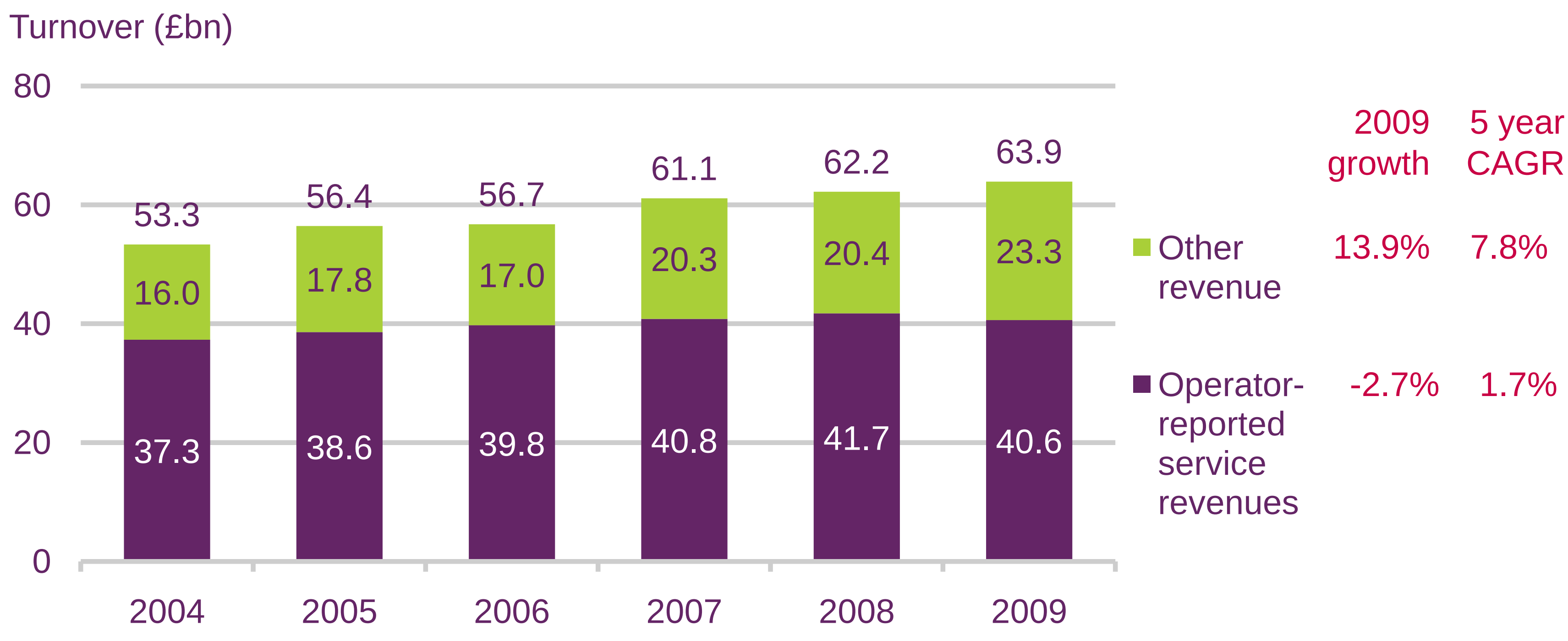
Figure 5.27

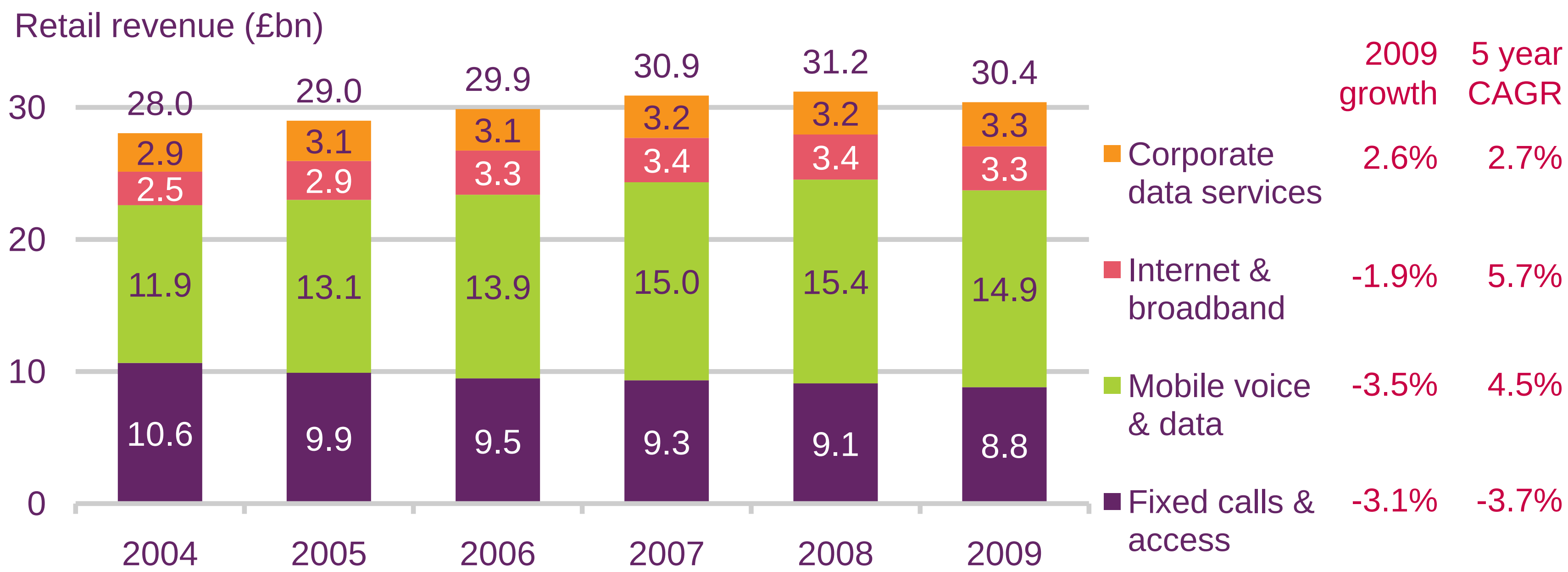
UK telecoms industry revenue overview



Source: Ofcom / ONS / operators
Note: Includes estimates where Ofcom does not receive data from operators

Figure 5.28

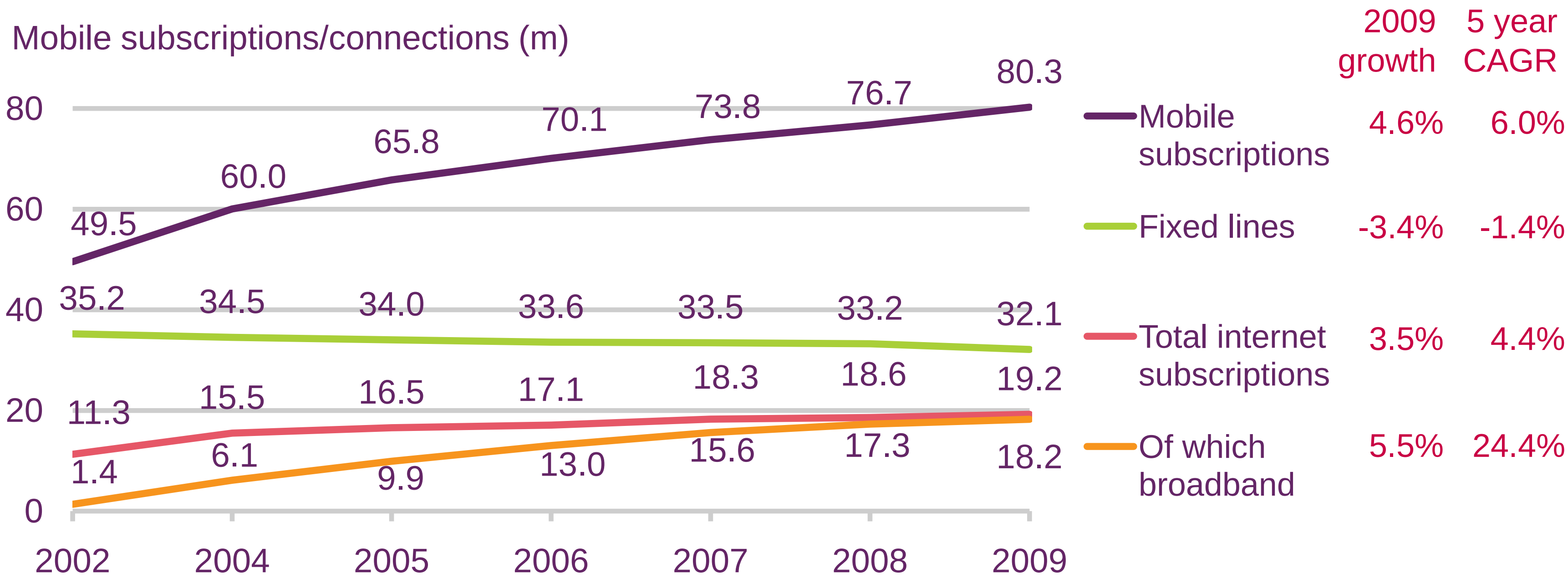
UK telecoms industry retail revenue



Source: Ofcom / operators / IDC

Figure 5.29

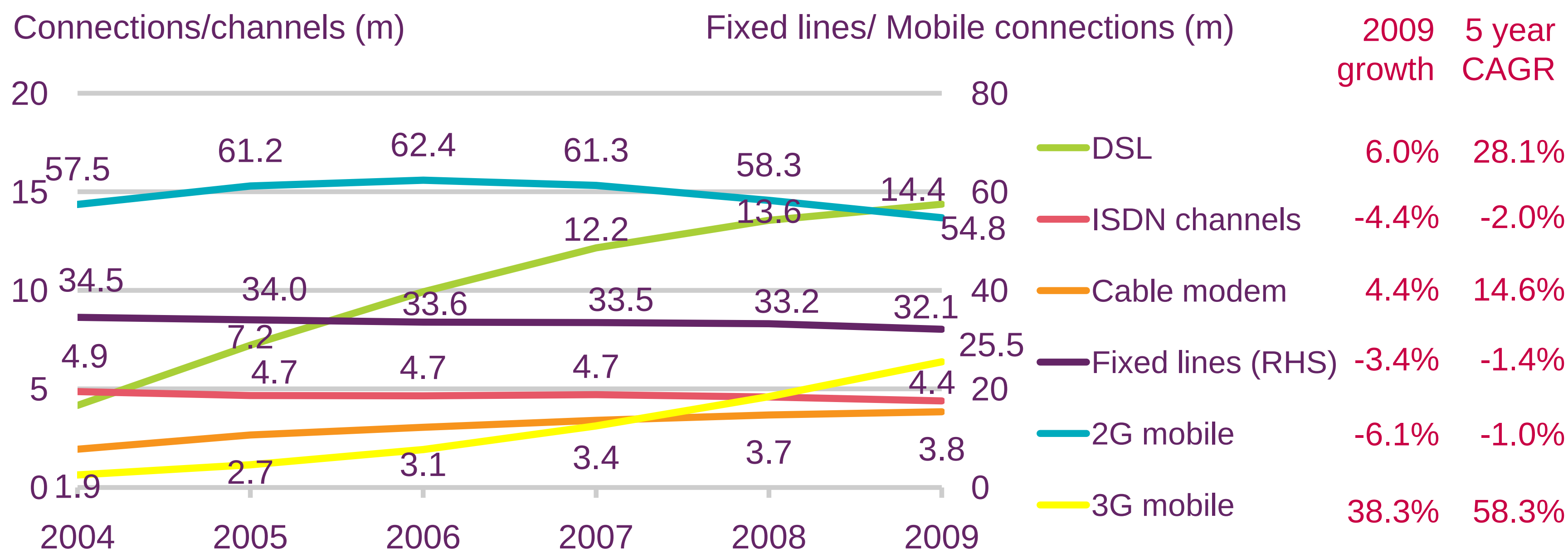
Total telecoms connections



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; broadband excludes corporate connections

Figure 5.30

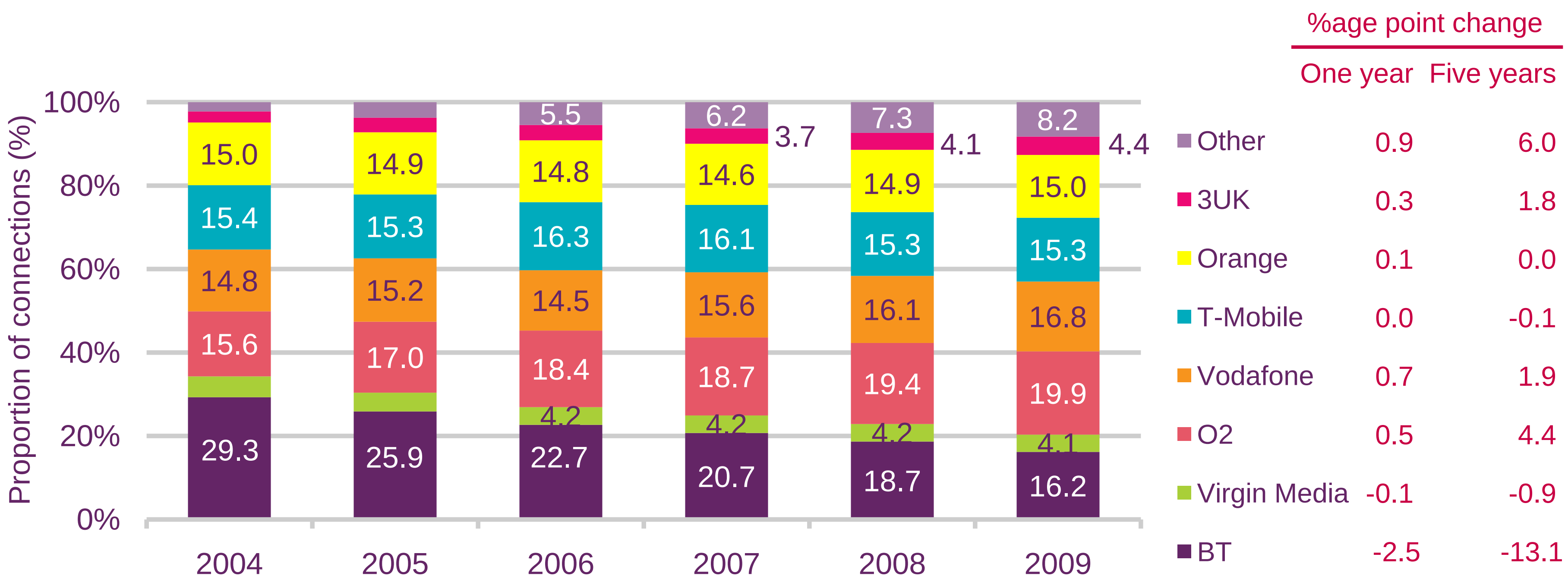
Fixed and mobile telecoms connections



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; broadband excludes corporate connections

Figure 5.31

Share of total UK fixed and mobile telecoms connections

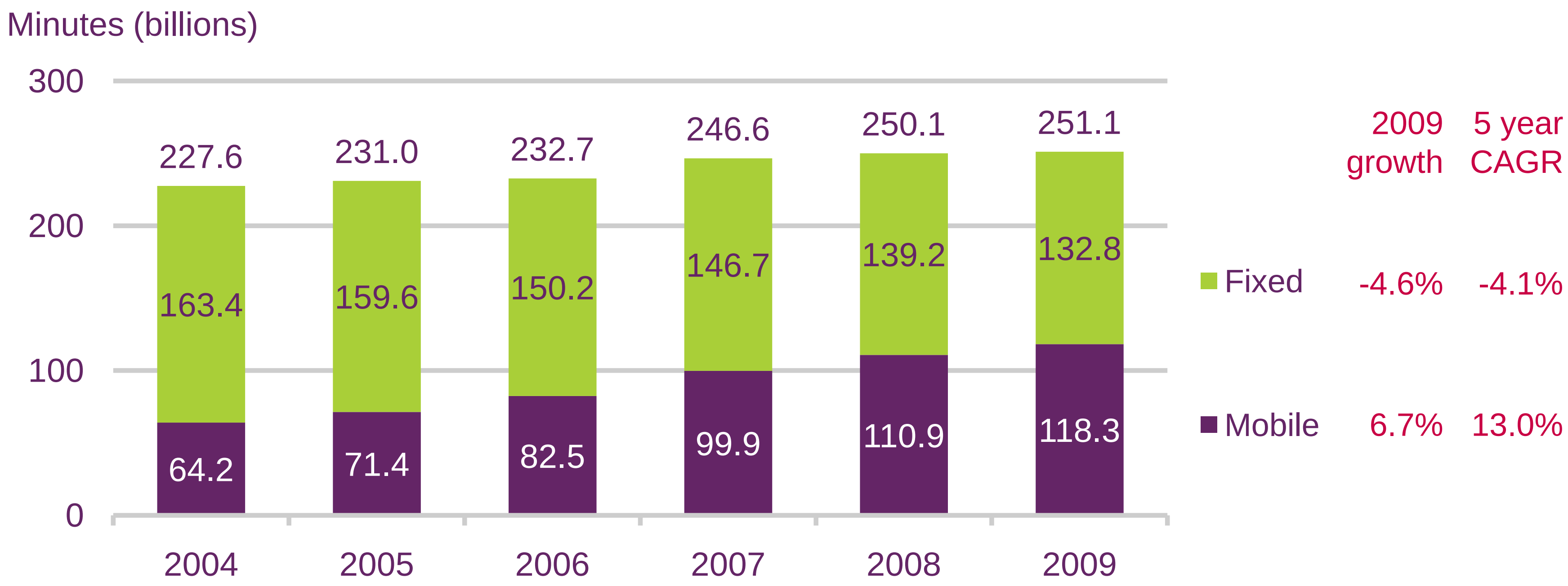


Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators; ‘Other’ includes carrier pre-selection and wholesale line rental in additional to fixed other licensed operators. MVNOs and mobile service provider connections are included within the network operator figures

Figure 5.32

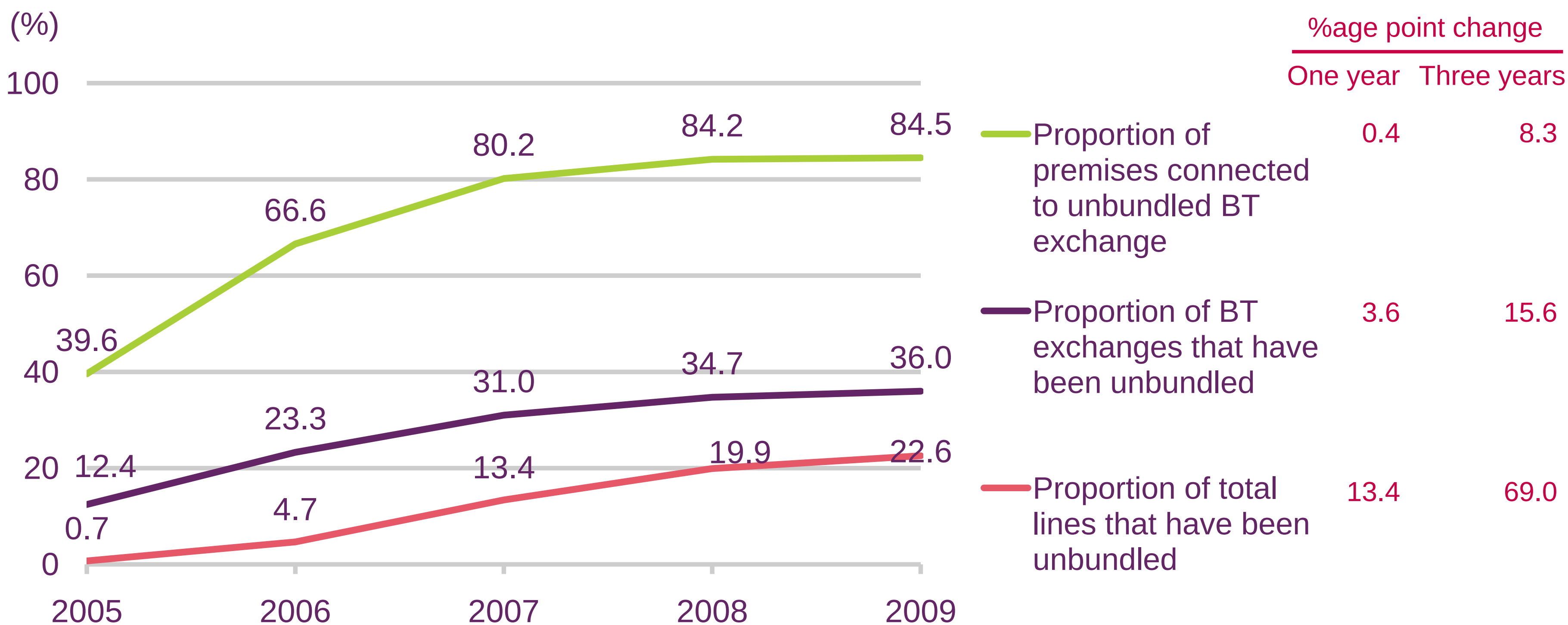
Mobile voice call volumes



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

Figure 5.33

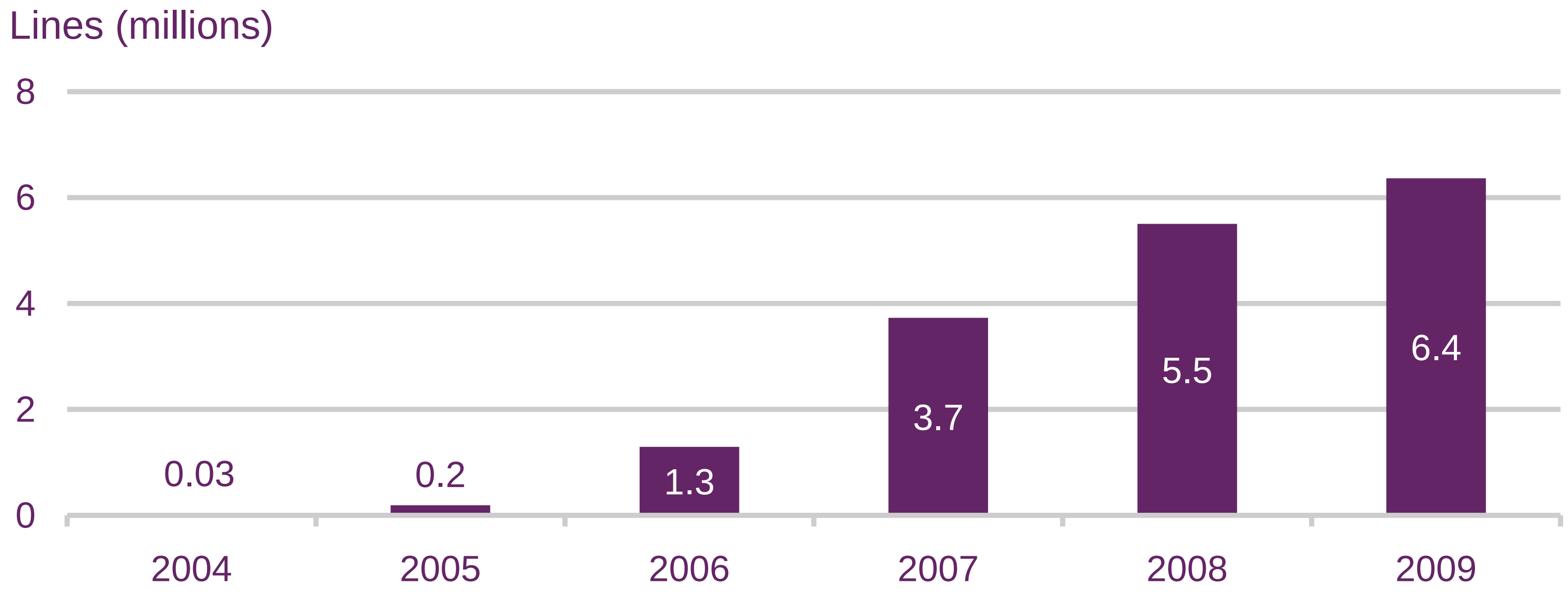
Proportion of unbundled exchanges and connected premises



Source: Ofcom / operators

Figure 5.34

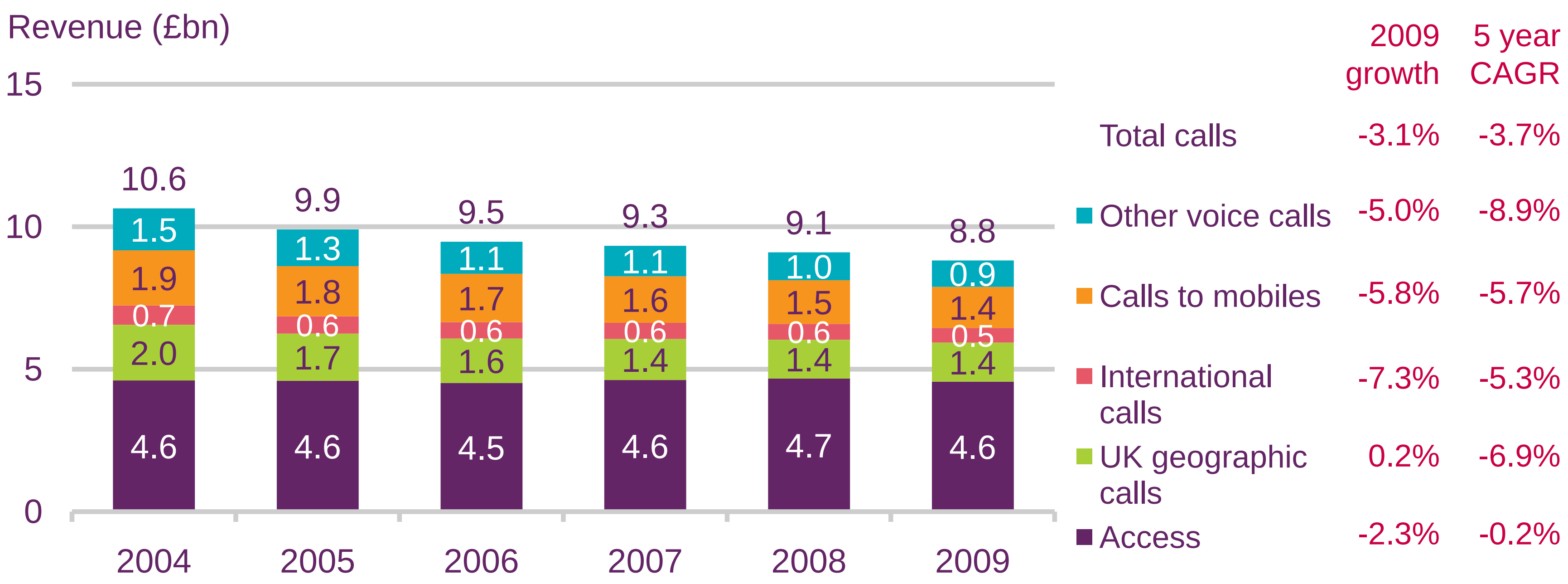
Fully and partially unbundled lines



Source: Ofcom / operators

Figure 5.35

Fixed voice telecoms revenue



Source: Ofcom / operators

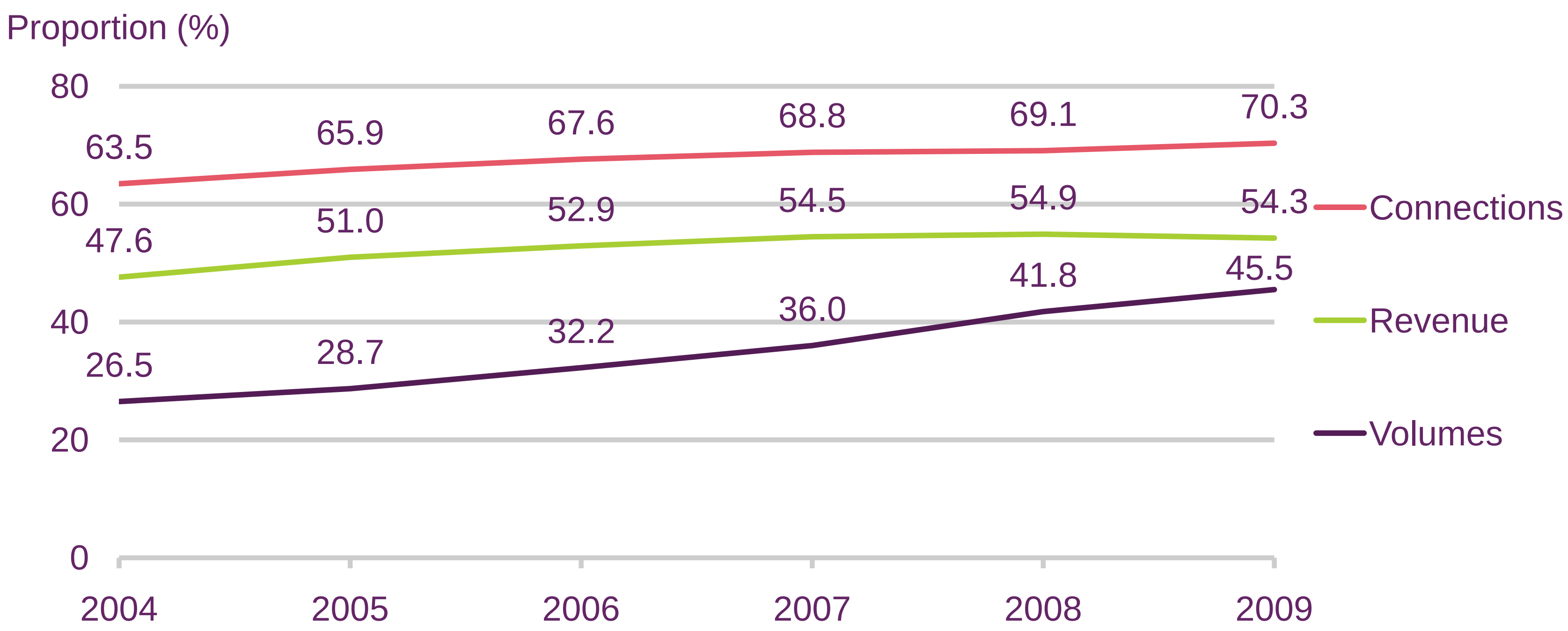
Figure 5.36

Average monthly voice revenue per fixed line

Source: Ofcom / operators
Note: Includes spend on non-geographic voice calls

Figure 5.37

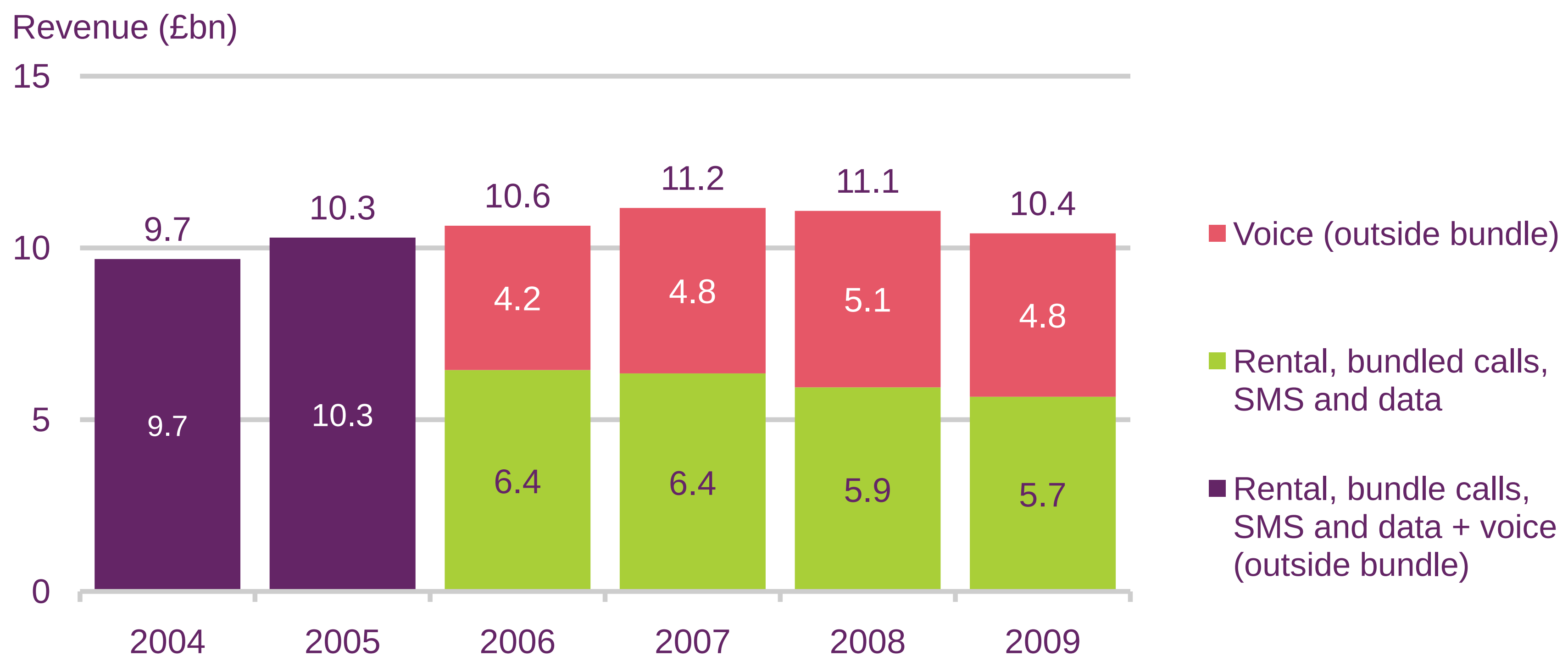
Mobile share of total voice connections, revenues and volumes



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators. Mobile figures do not include dongles/PC datacard connections

Figure 5.38

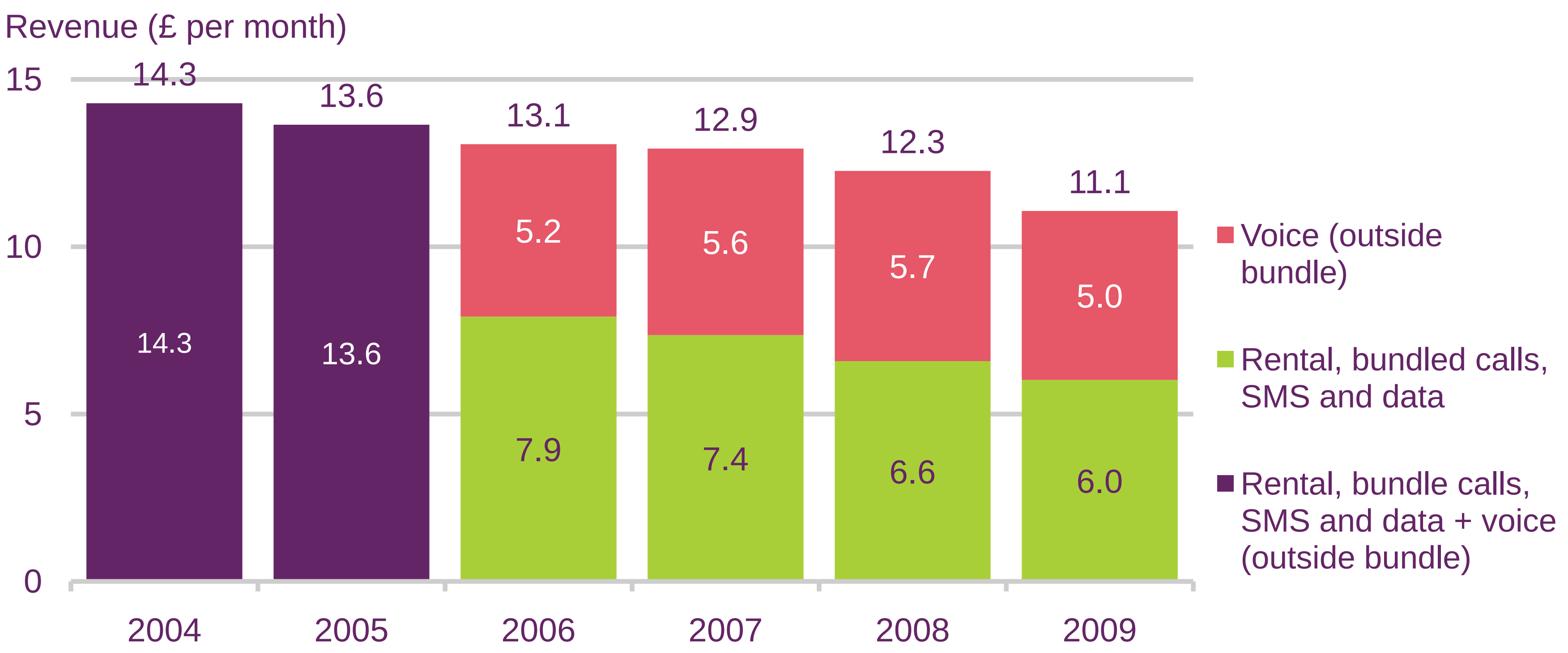
Estimated mobile telecom retail revenue from bundles and voice services



Source: Ofcom/Operators
Note: The split between revenue from rental, bundled calls and SMS AND voice revenue (outside bundle) is only available from 2006 onwards.

Figure 5.39

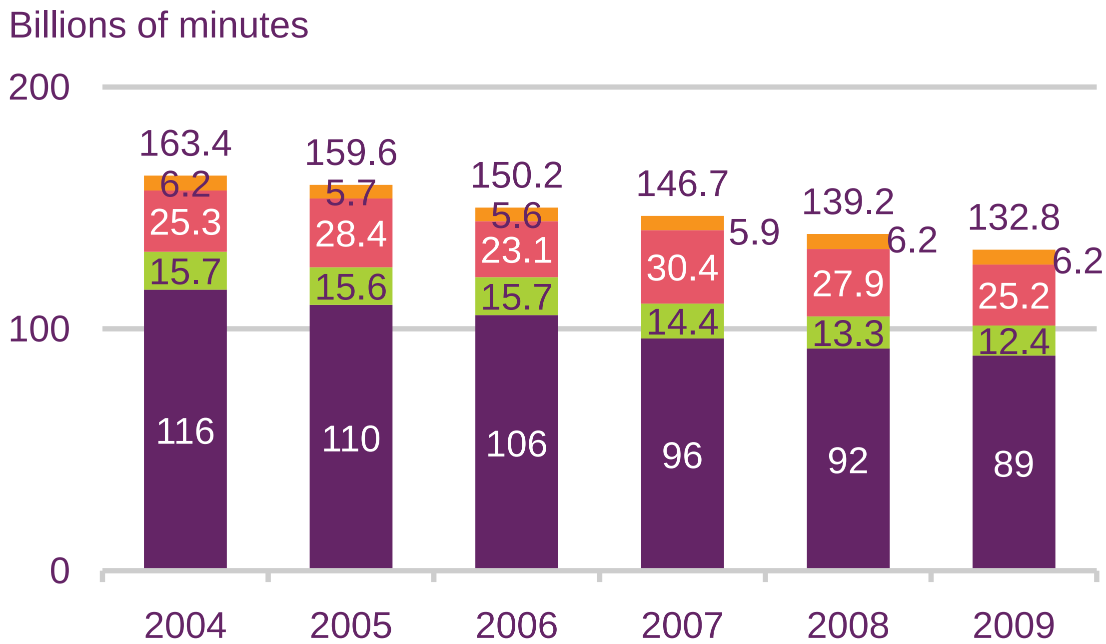
Average monthly retail revenue per mobile subscription 2004 - 2009



Source: Ofcom/Operators
Note: The split between revenue from rental, bundled calls and SMS AND voice revenue (outside bundle) is only available from 2006 onwards.

Figure 5.40

Fixed telecom call volumes

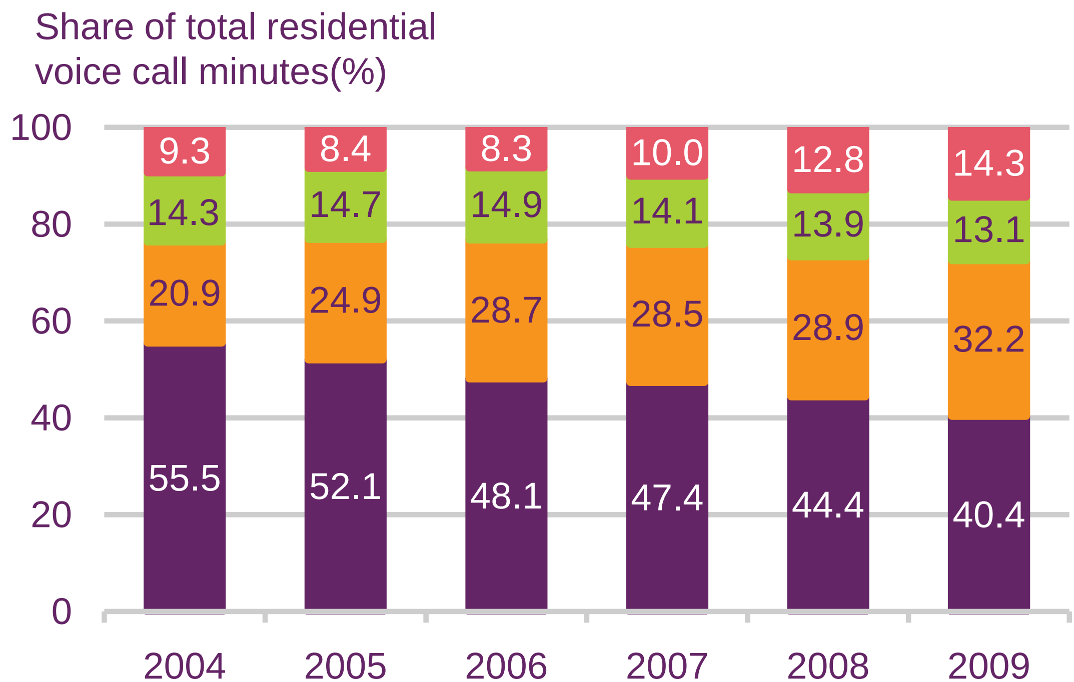


	2009 growth	5 year CAGR
International calls	0.3%	0.1%
Other calls	-9.7%	-0.1%
Calls to mobiles	-6.3%	-4.5%
UK geographic calls	-3.2%	-5.2%

Source: Ofcom / operators

Figure 5.41

Share of retail residential voice call volumes



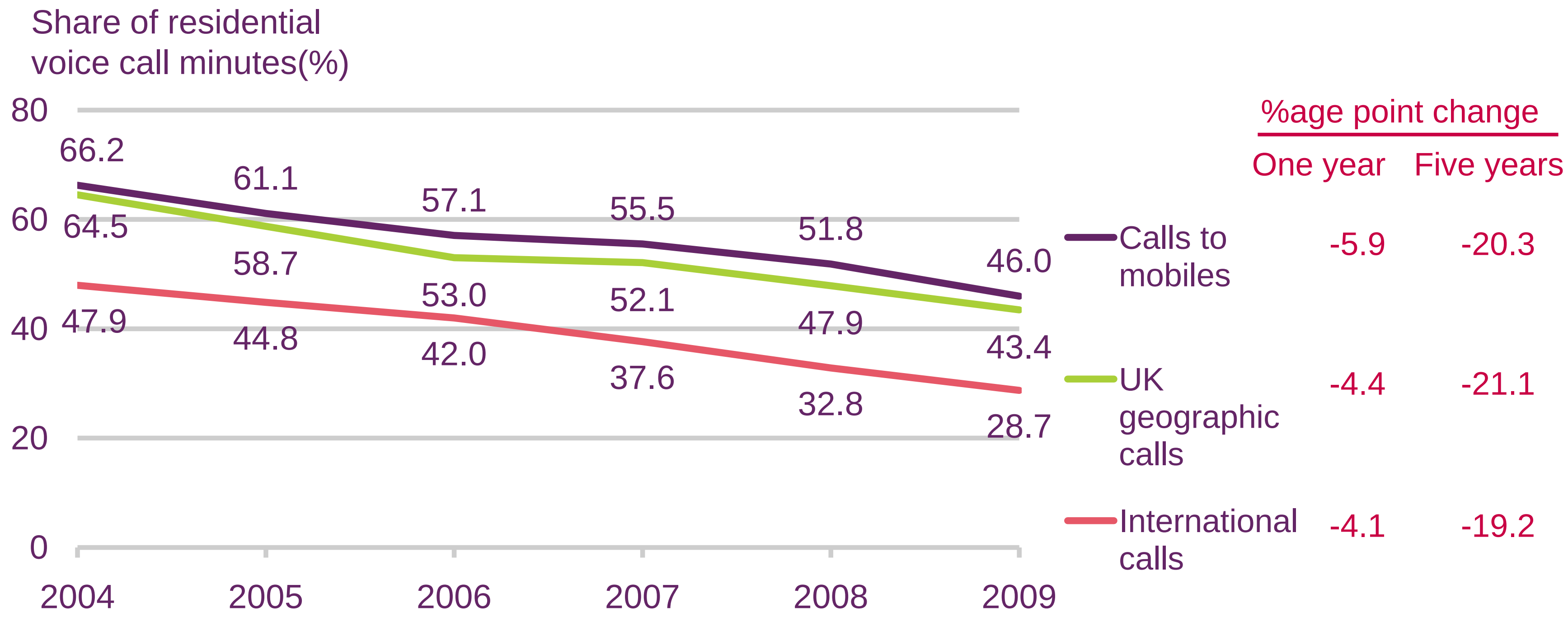
%age point change

	One year	Five years
Other Direct Access	1.5	5.0
Virgin Media	-0.7	-1.2
Other Indirect Access	3.3	11.3
BT	-4.0	-15.1

Source: Ofcom / operators
Excludes NTS calls

Figure 5.42

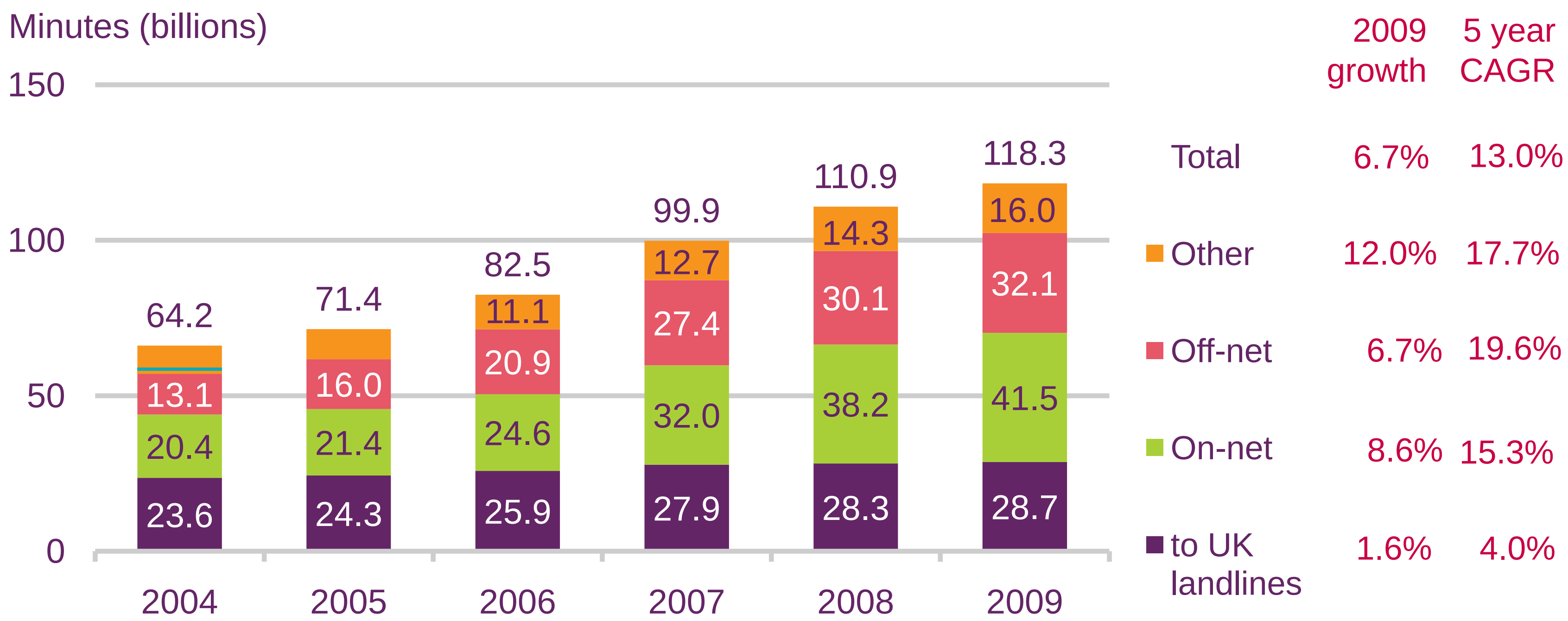
BT share of retail residential voice call volumes by type



Source: Ofcom / operators

Figure 5.43

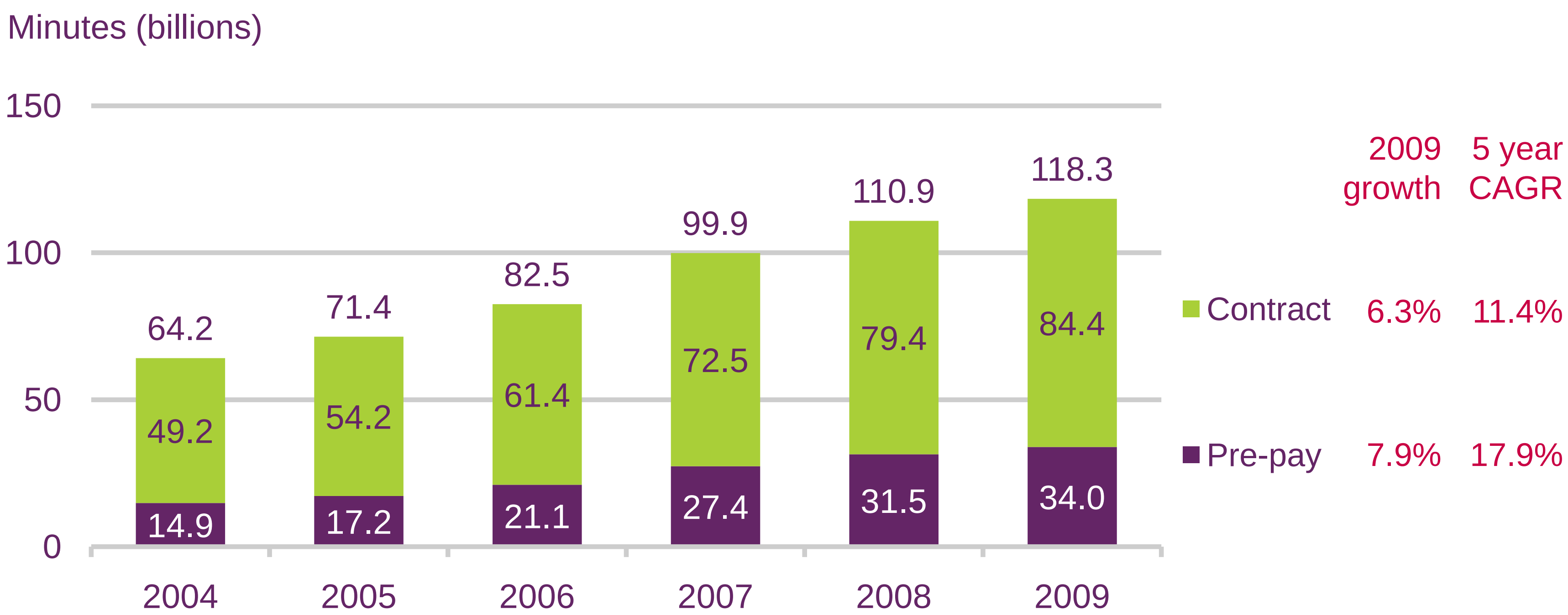
Mobile telecom call volumes



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

Figure 5.44

Mobile voice call volumes, by subscription type

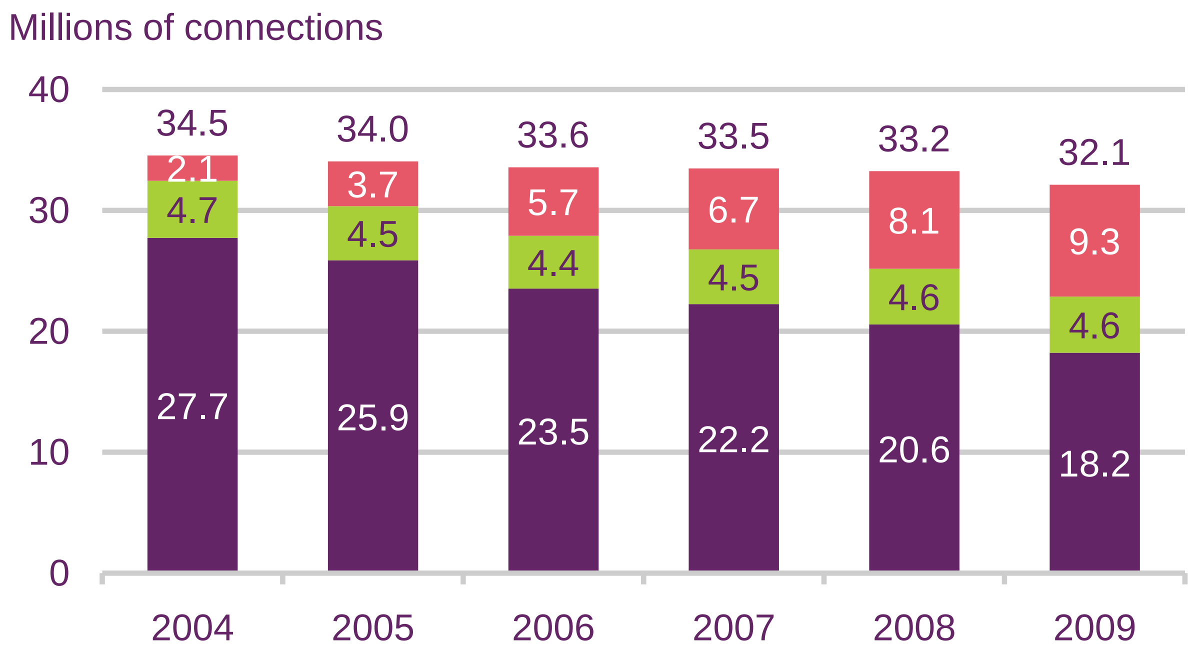


Source: Ofcom / operators

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

Figure 5.45

Fixed-line connections by operator

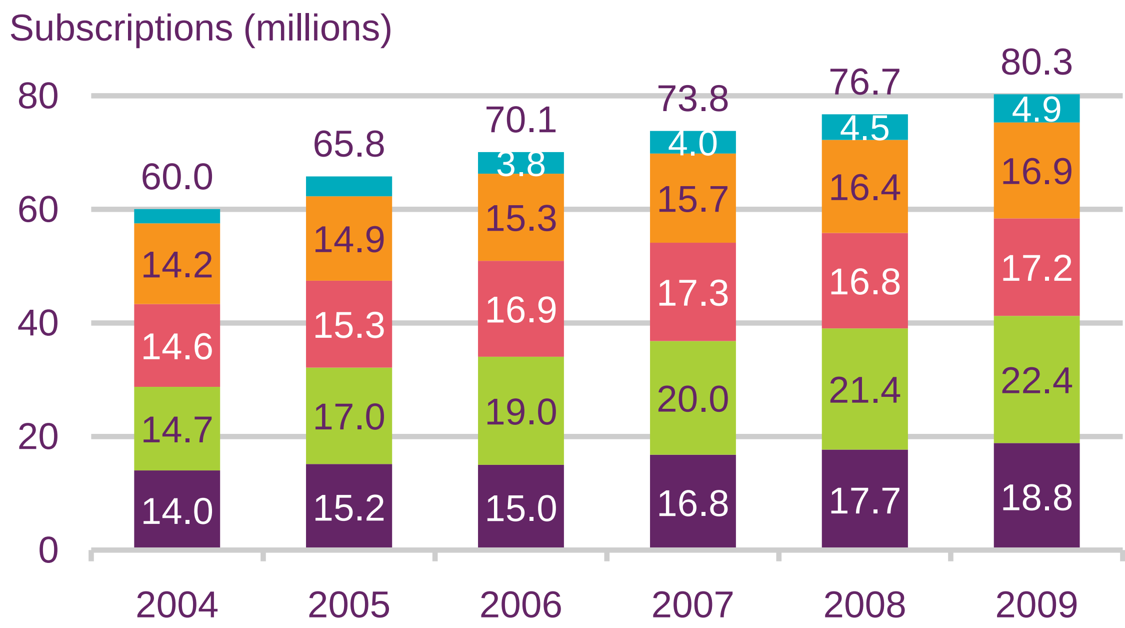


	2009 growth	5 year CAGR
Other	14.8%	34.7%
Virgin Media	0.7%	-0.4%
BT	-11.4%	-8.0%

Source: Ofcom / operators

Figure 5.46

Mobile subscriptions, by operator

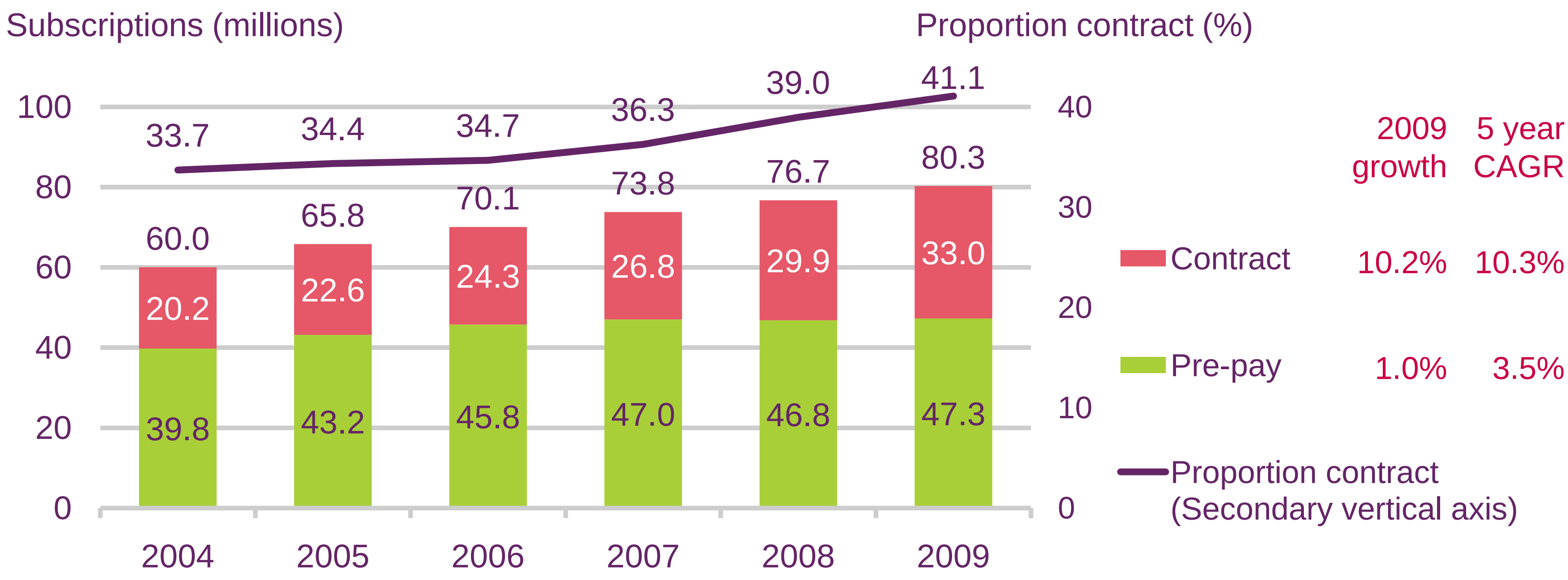


	2009 growth	5 year CAGR
3UK	9.9%	14.6%
Orange	3.0%	3.5%
T-Mobile (including Virgin Mobile)	2.3%	3.3%
O2 (including Tesco Mobile)	4.8%	8.8%
Vodafone	6.6%	6.1%

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

Figure 5.47

Pre-pay and contract mobile subscriptions



Source: Ofcom / operators
Notes: Based on network operator reported figures; includes estimates where Ofcom does not receive data from the operators

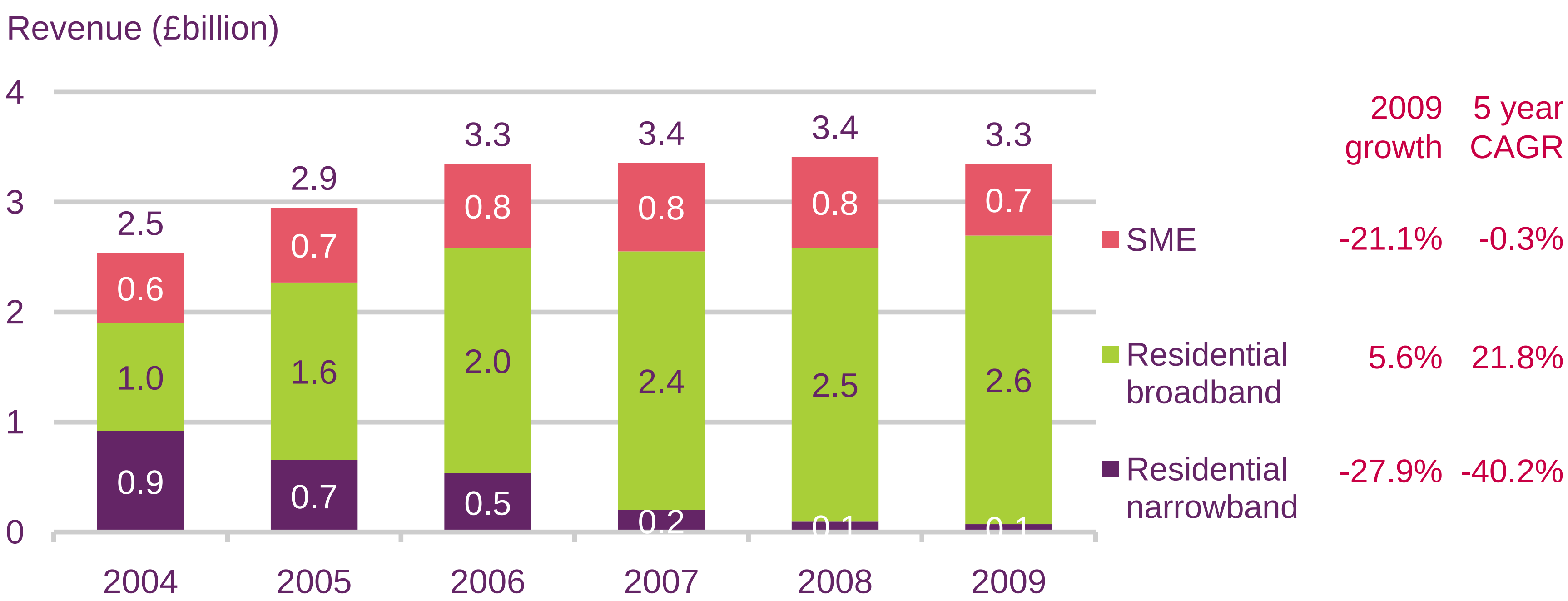
Figure 5.48

Voice and data operator-reported UK telecoms industry retail revenue

Source: Ofcom / operators
The bundling of messaging and data services in with monthly rental tariffs means voice revenue will include an element of mobile data revenue

Figure 5.49

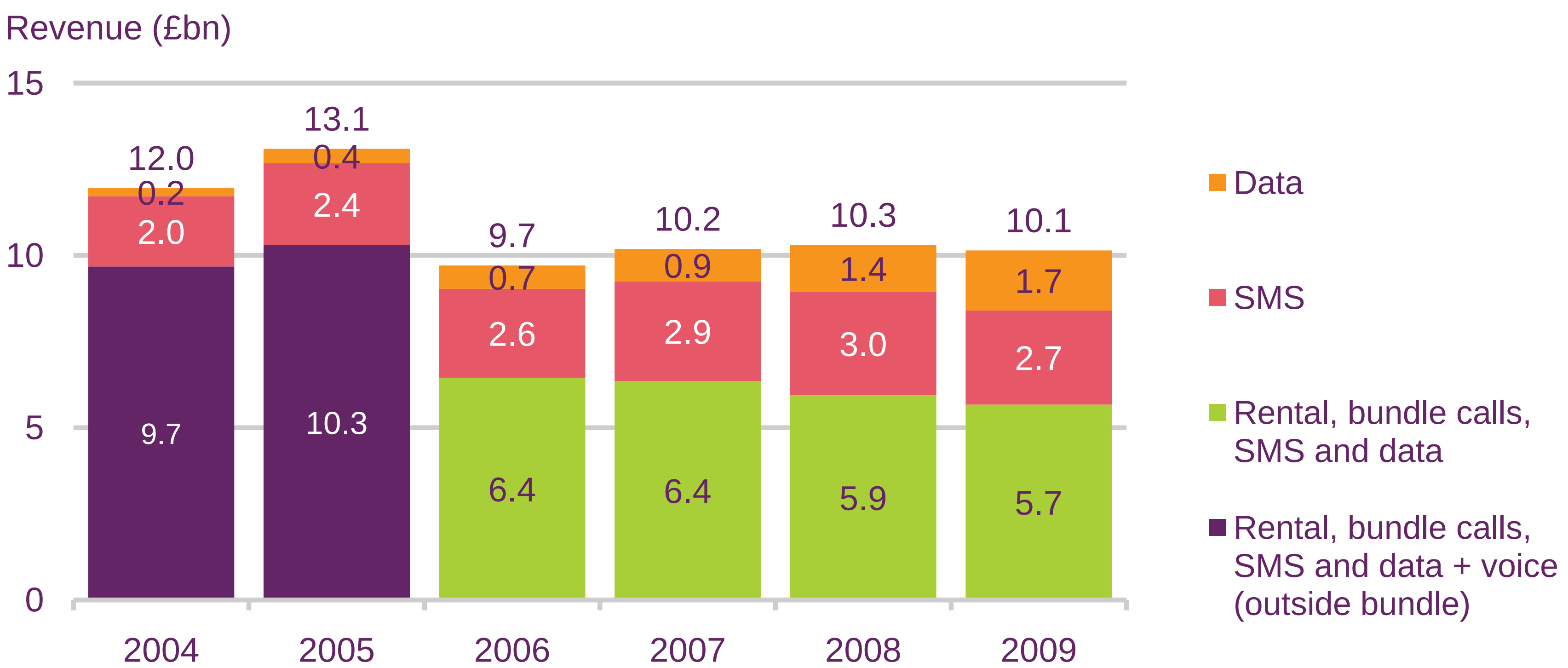
Estimated UK internet and broadband retail revenue



Source: Ofcom / operators

Figure 5.50

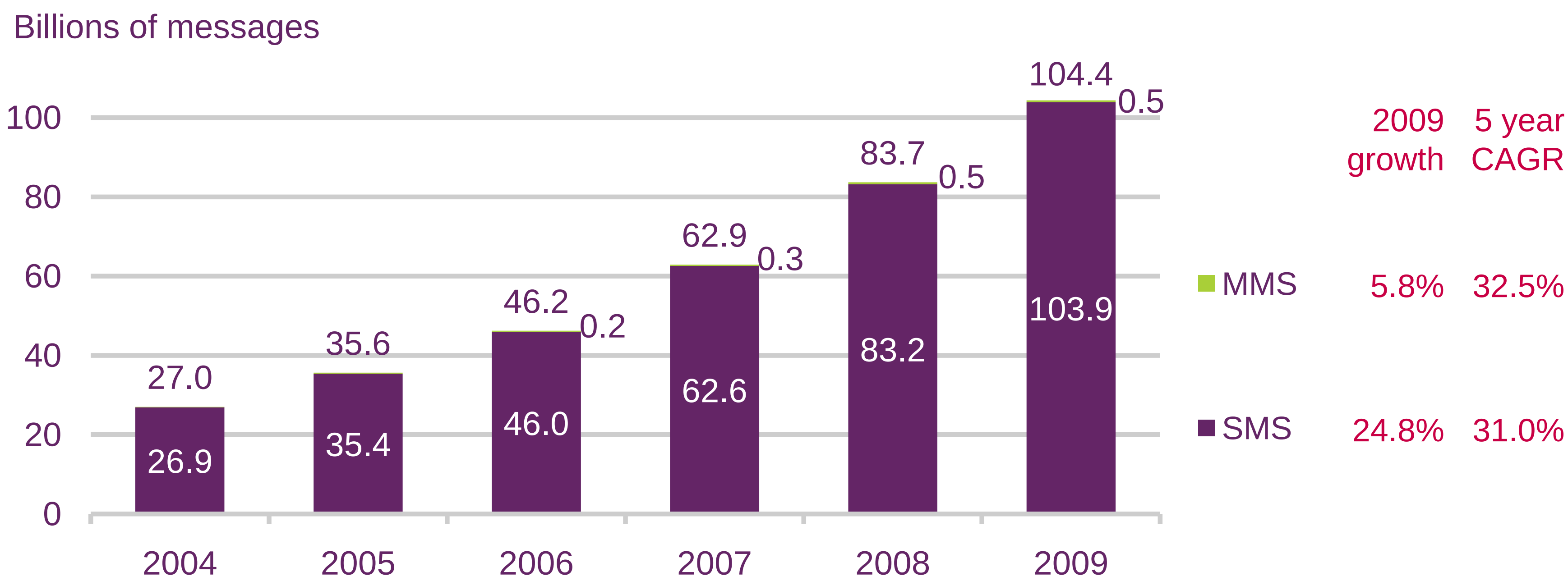
Mobile data revenues



Source: Ofcom/Operators
Note: The split between revenue from rental, bundled calls and SMS AND voice revenue (outside bundle) is only available from 2006 onwards.

Figure 5.51

Mobile messaging volumes

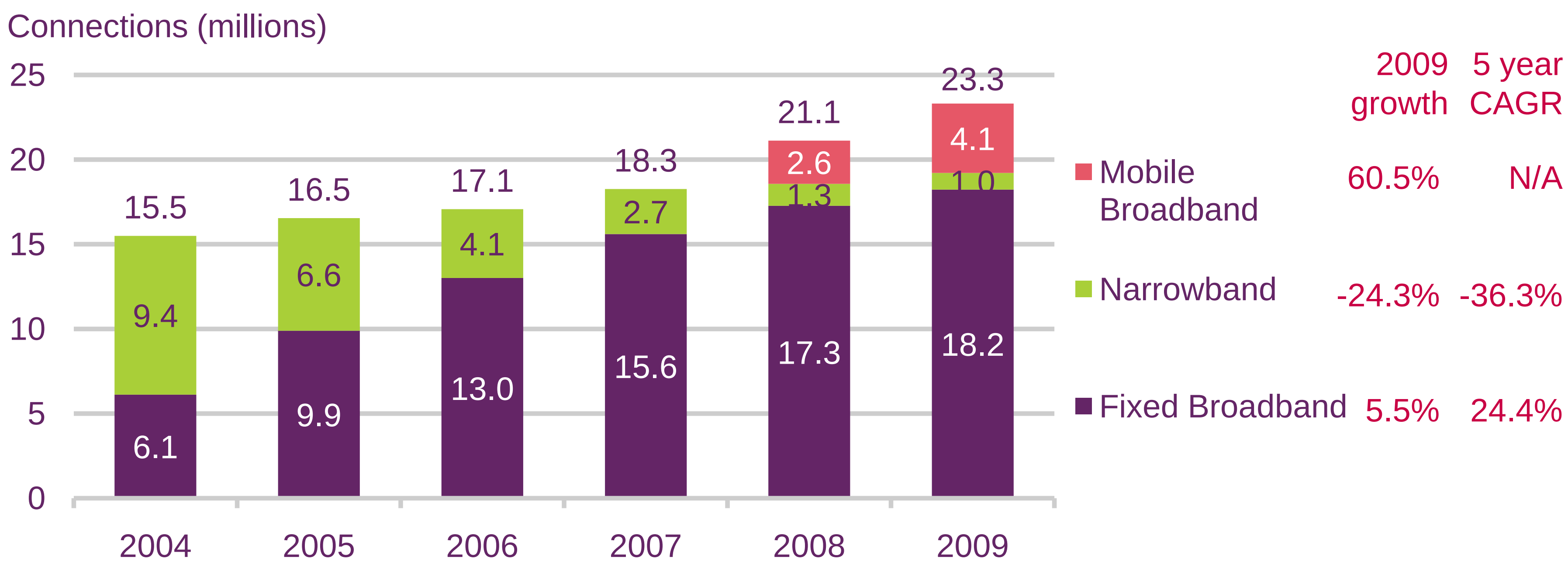


Source: Ofcom / operators

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

Figure 5.52

Estimated UK internet and broadband connections

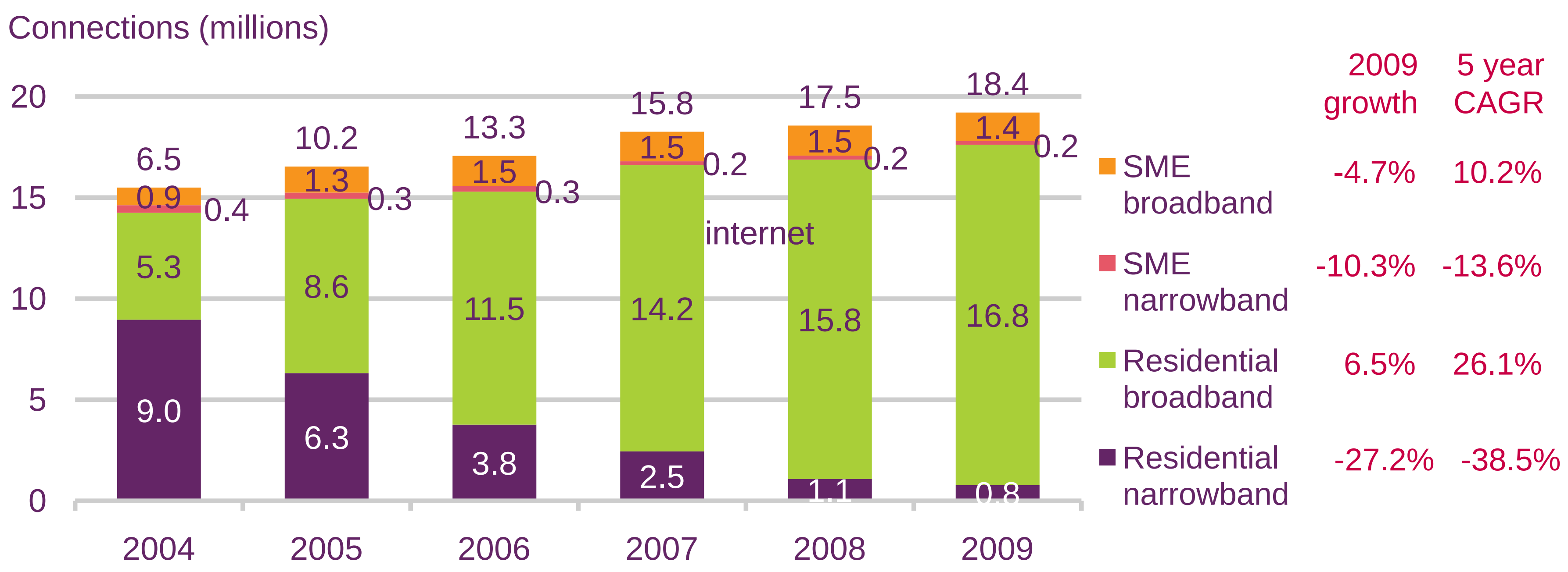


Source: Ofcom / operators

Mobile broadband is defined as connection to the internet via a PC datacard or dongle

Figure 5.53

UK residential and small business internet connections

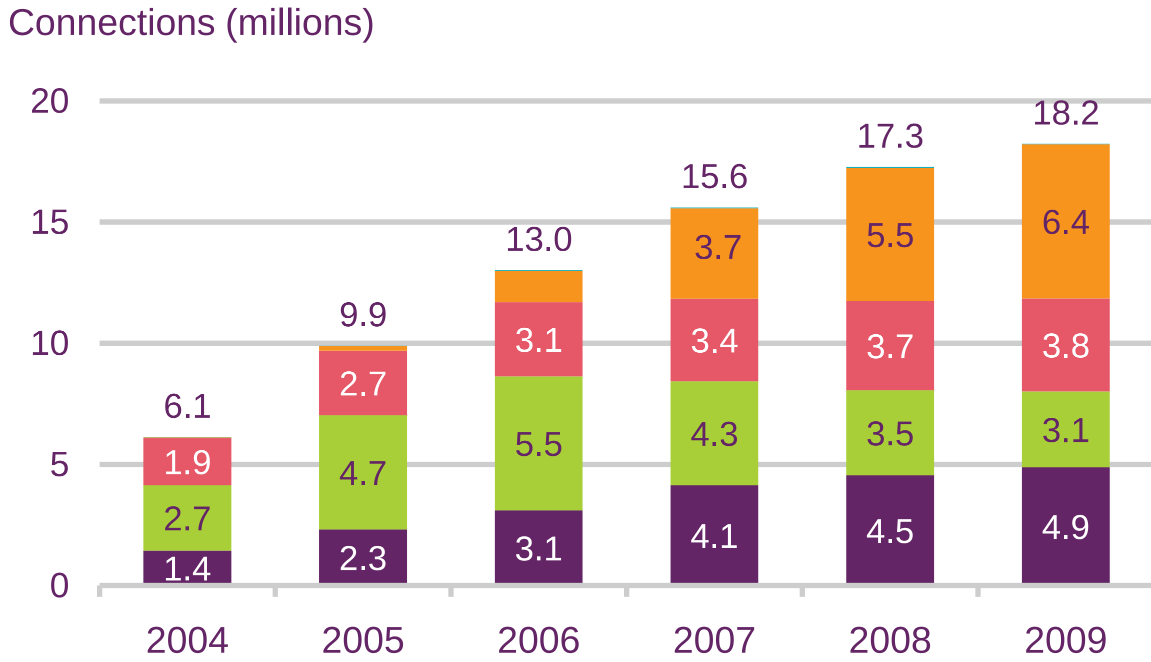


Source: Ofcom / operators

Note: SME broadband includes some connections over leased lines

Figure 4.54

UK residential and small business broadband connections



	2009 growth	5 year CAGR
Other	-49.2%	12.8%
LLU DSL	15.6%	196.4%
Cable modem	4.4%	14.6%
Other non-LLU DSL	-10.8%	3.0%
BT retail DSL	7.3%	27.6%

Source: Ofcom / operators
Note: Excludes connections made over cellular networks

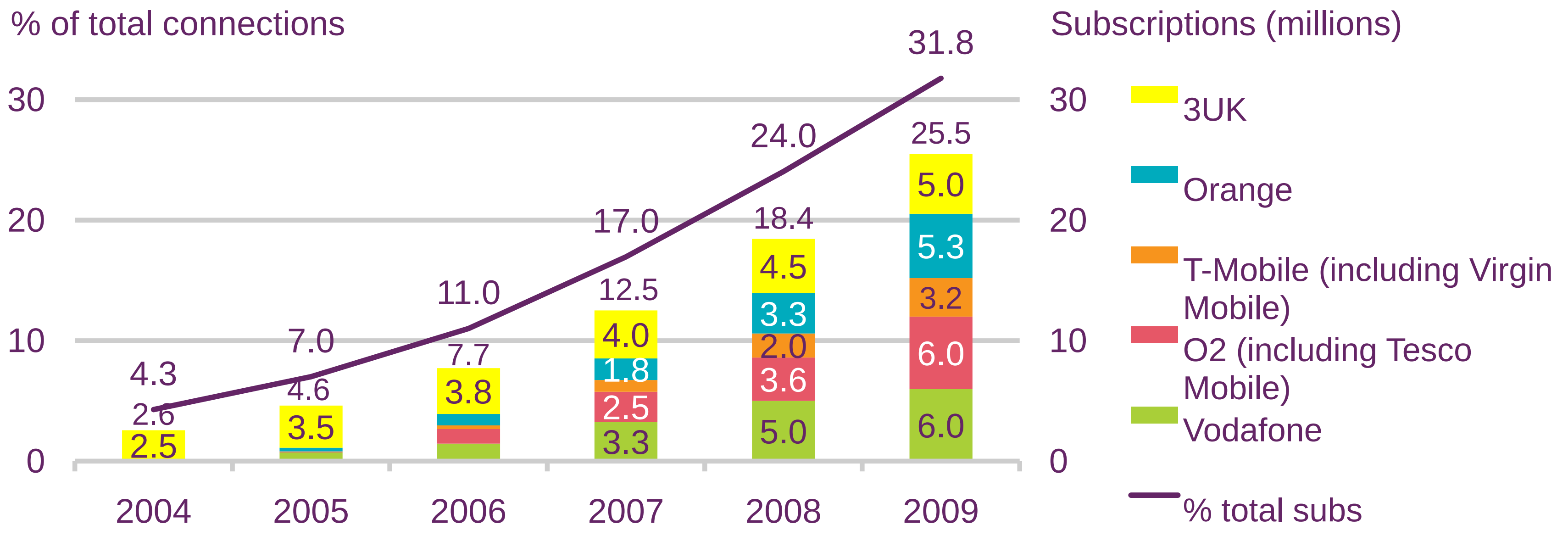
Figure 5.55

2G and 3G share of mobile subscriptions

Source: Ofcom / operators

Figure 5.56

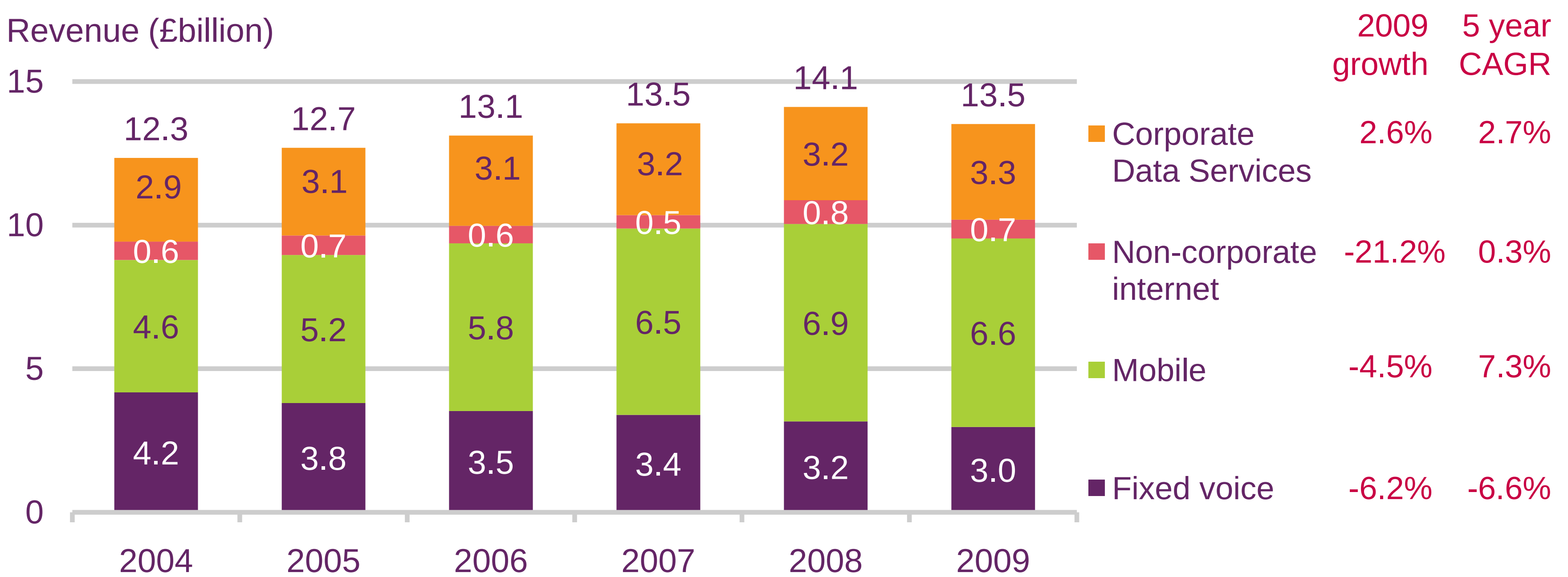
3G subscriptions, by network operator



Source: Ofcom / operators
Note: 3G includes connections made via laptops/dongles as well as handsets

Figure 5.57

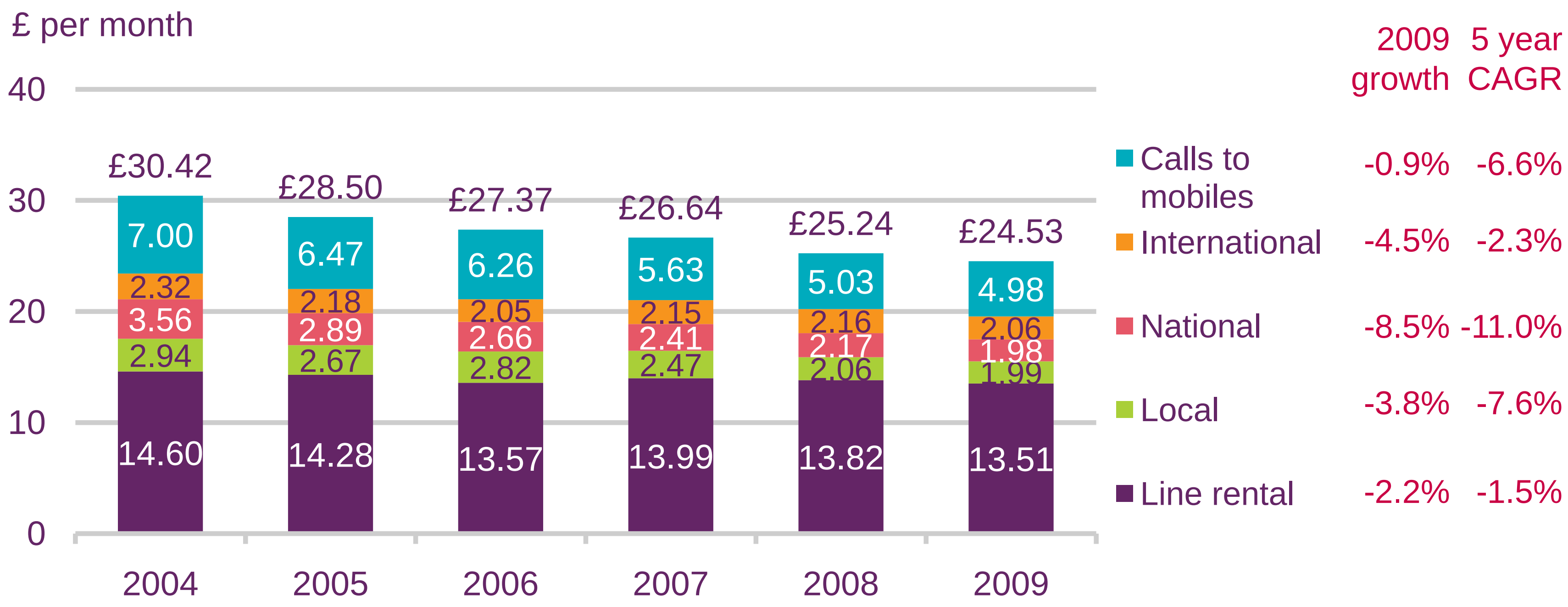
UK business telecoms services revenue



Source: Ofcom / operators / IDC

Figure 5.58

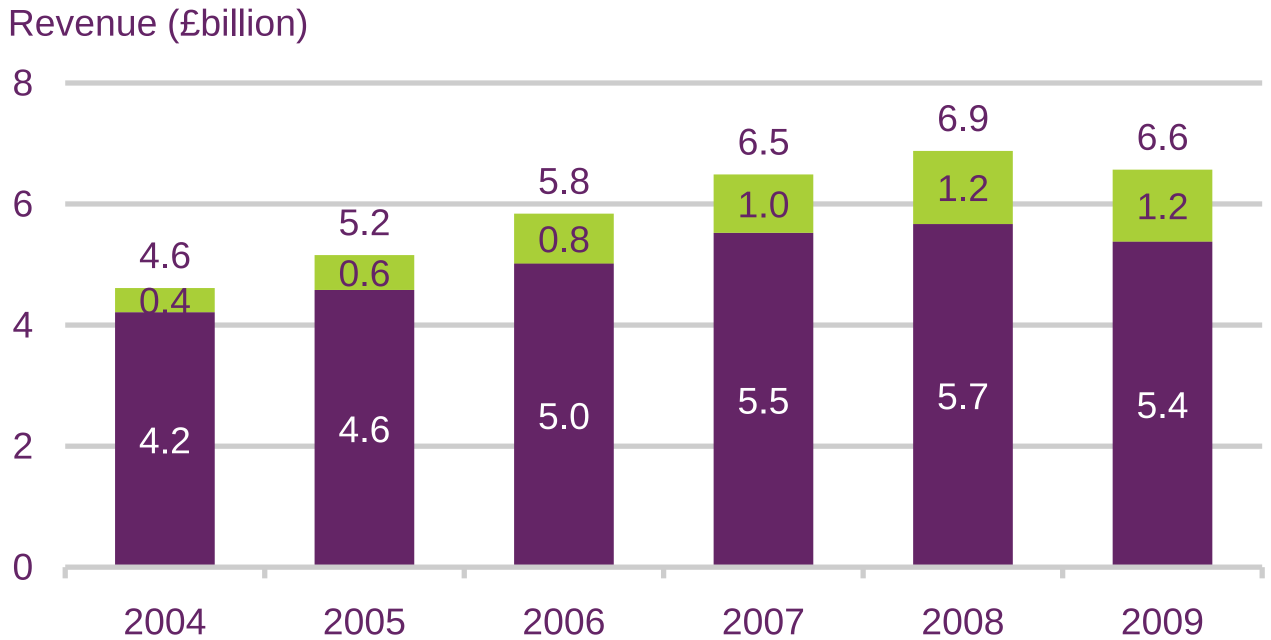
Average monthly voice revenue per business fixed line



Source: Ofcom / operators
Note: Excludes revenues from non-geographic voice calls

Figure 5.59

Breakdown of business mobile revenue

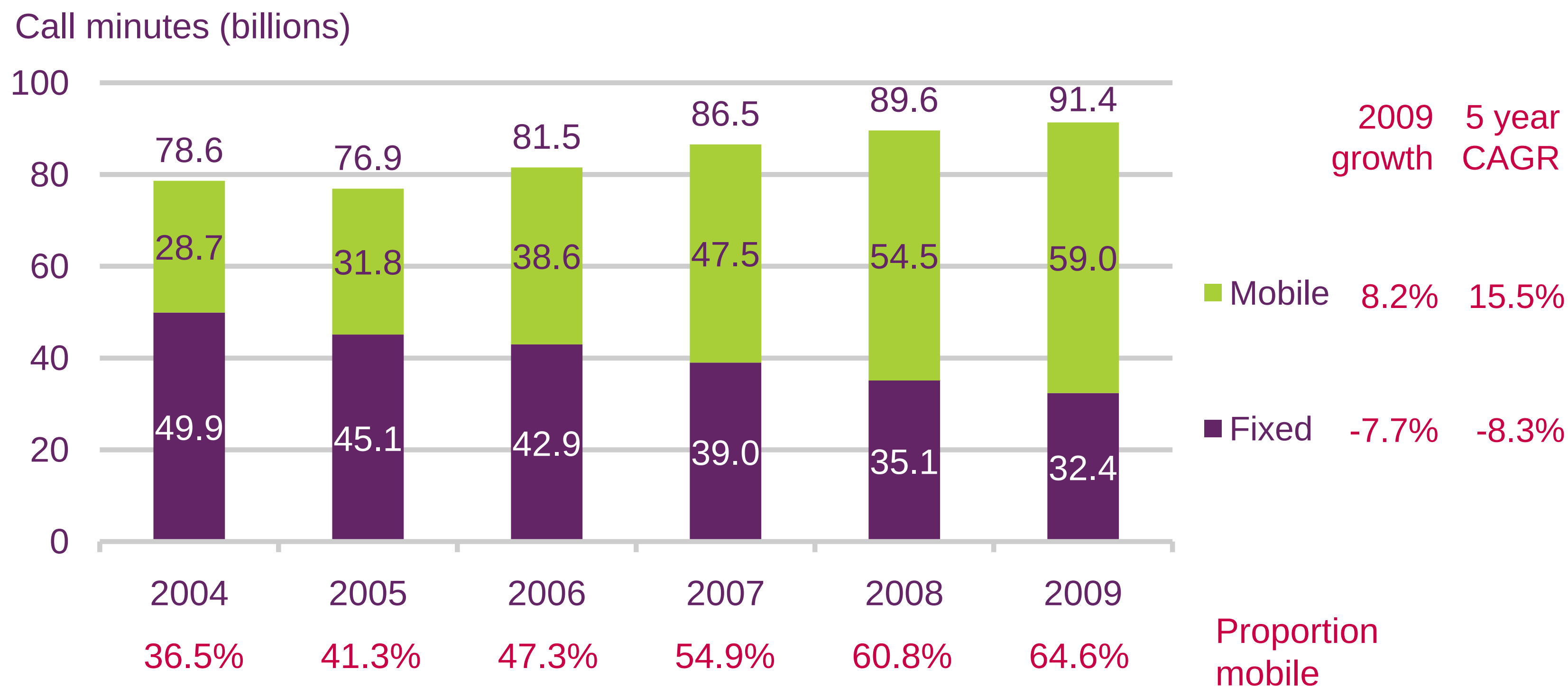


	2009 growth	5 year CAGR
Data (inc. SMS)	-1.6%	24.3%
Voice calls and rental	-5.1%	5.0%

Source: Ofcom / operators

Figure 5.60

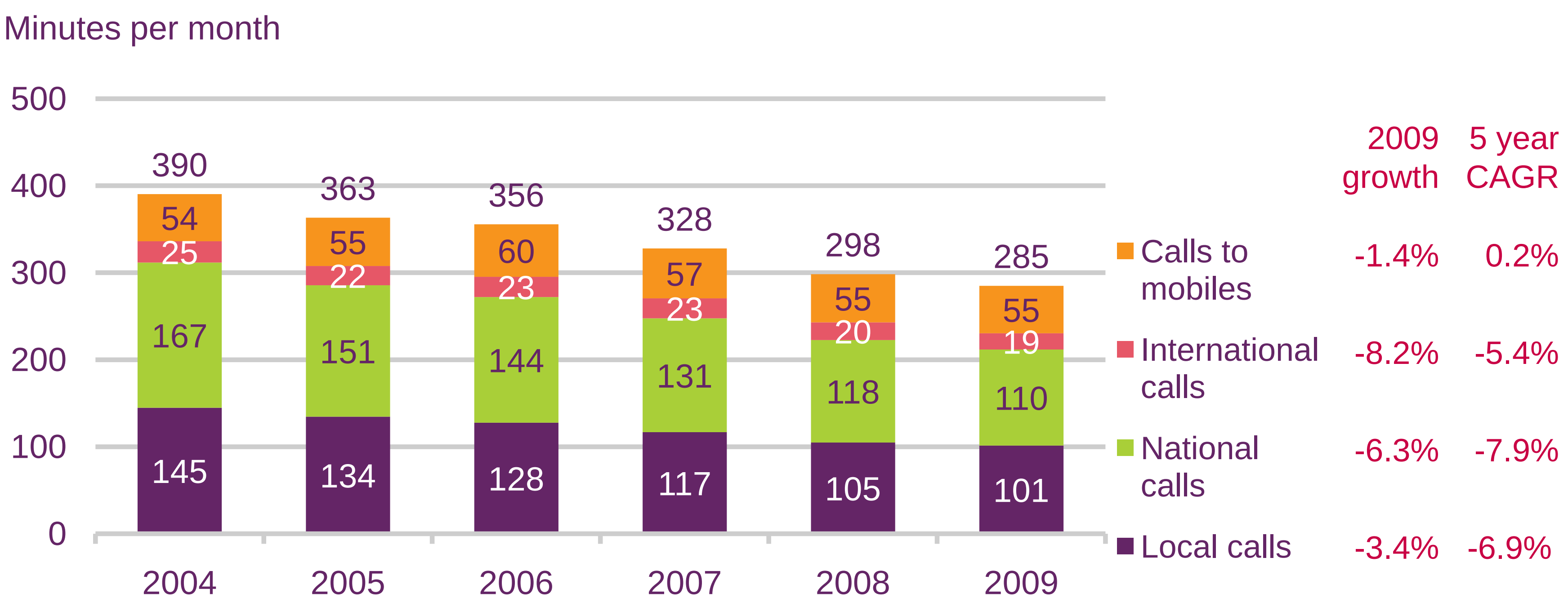
Business voice call volumes



Source: Ofcom / operators
Note: Fixed data excludes non-geographic voice call volumes

Figure 5.61

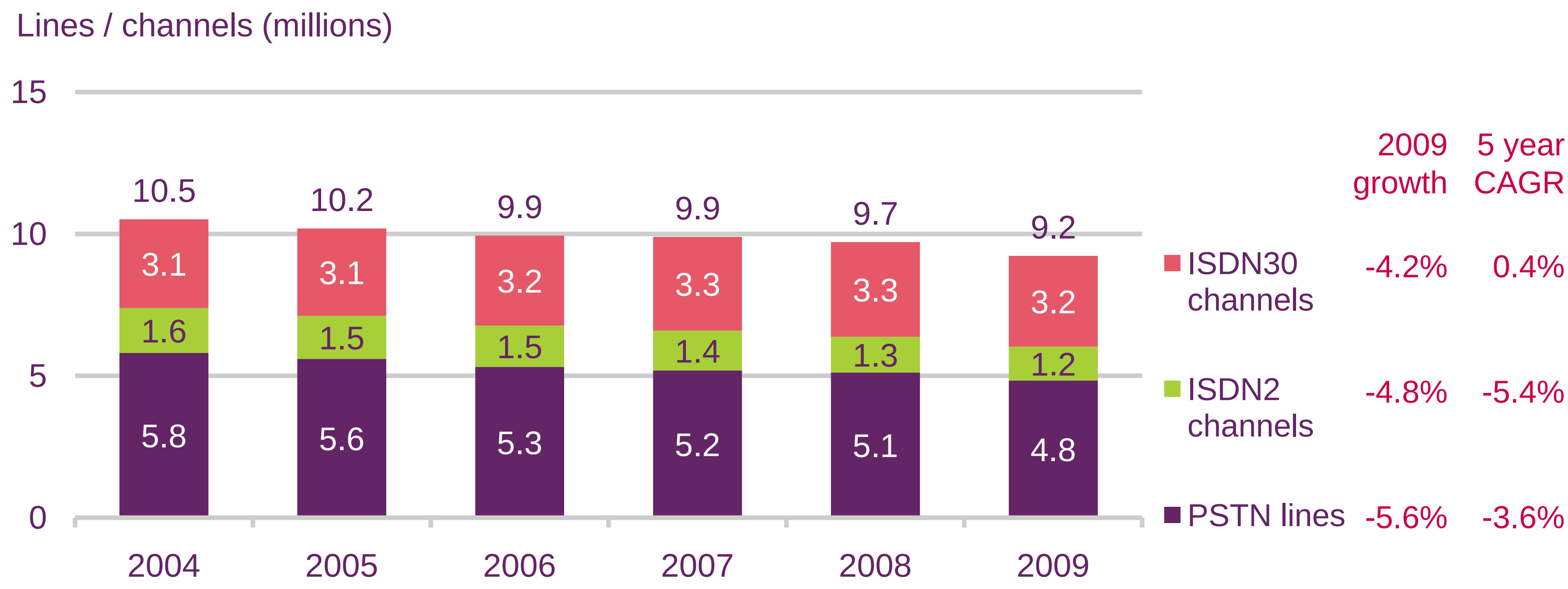
Average monthly outbound voice call volumes per business fixed line



Source: Ofcom / operators
Note: Excludes non-geographic voice call volumes

Figure 5.62

Business fixed lines, by type



Source: Ofcom / operators

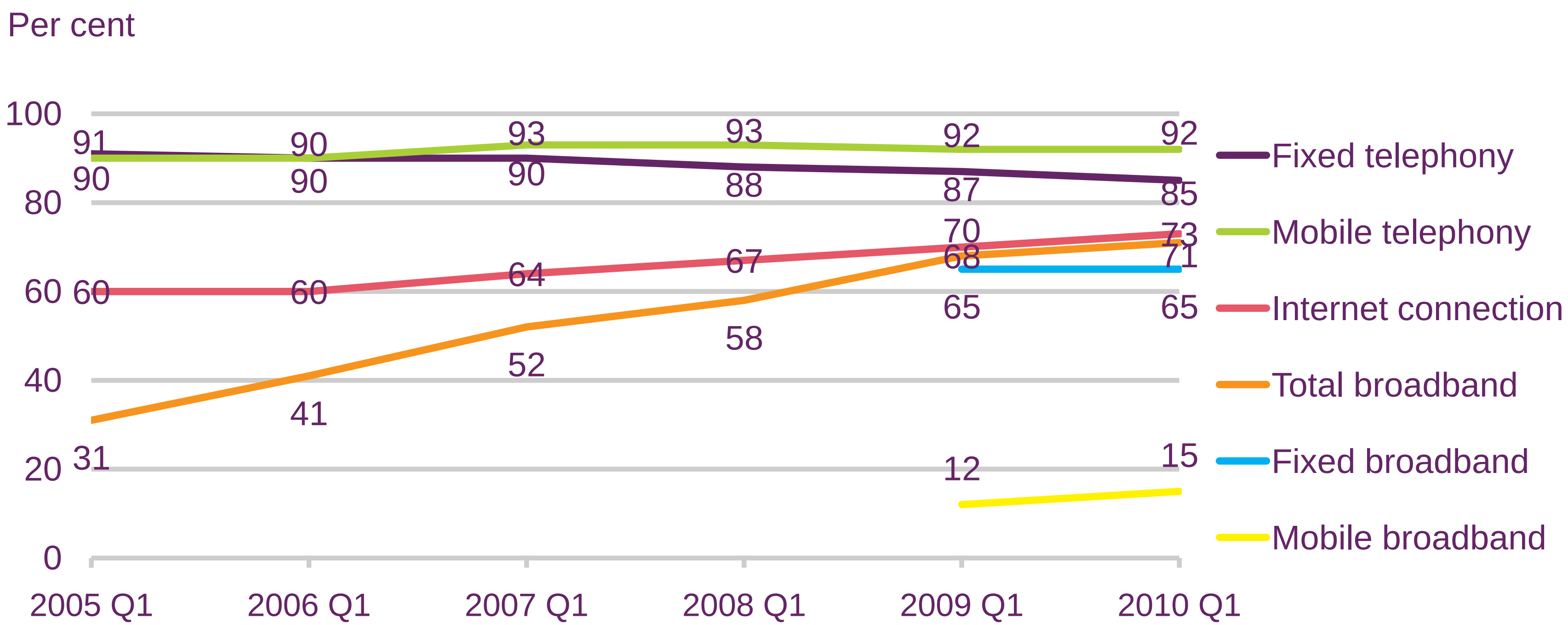
Note: Figures may be overstated due to an element of double-counting of WLR lines

UK Communications Market 2010: telecoms charts

- Key market developments
- The telecoms industry
- The telecoms user

Figure 5.63

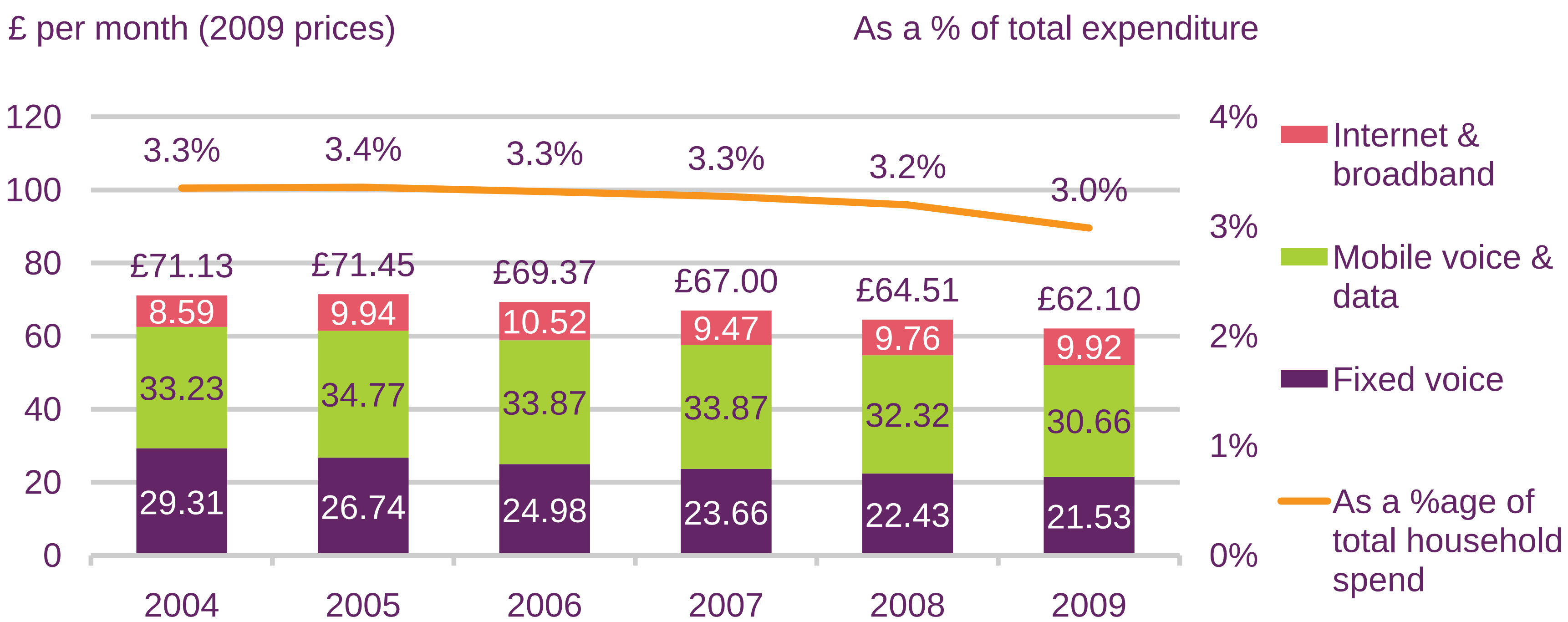
Household take-up of key telecoms technologies



Source: Ofcom research
Base: All adults aged 15+

Figure 5.64

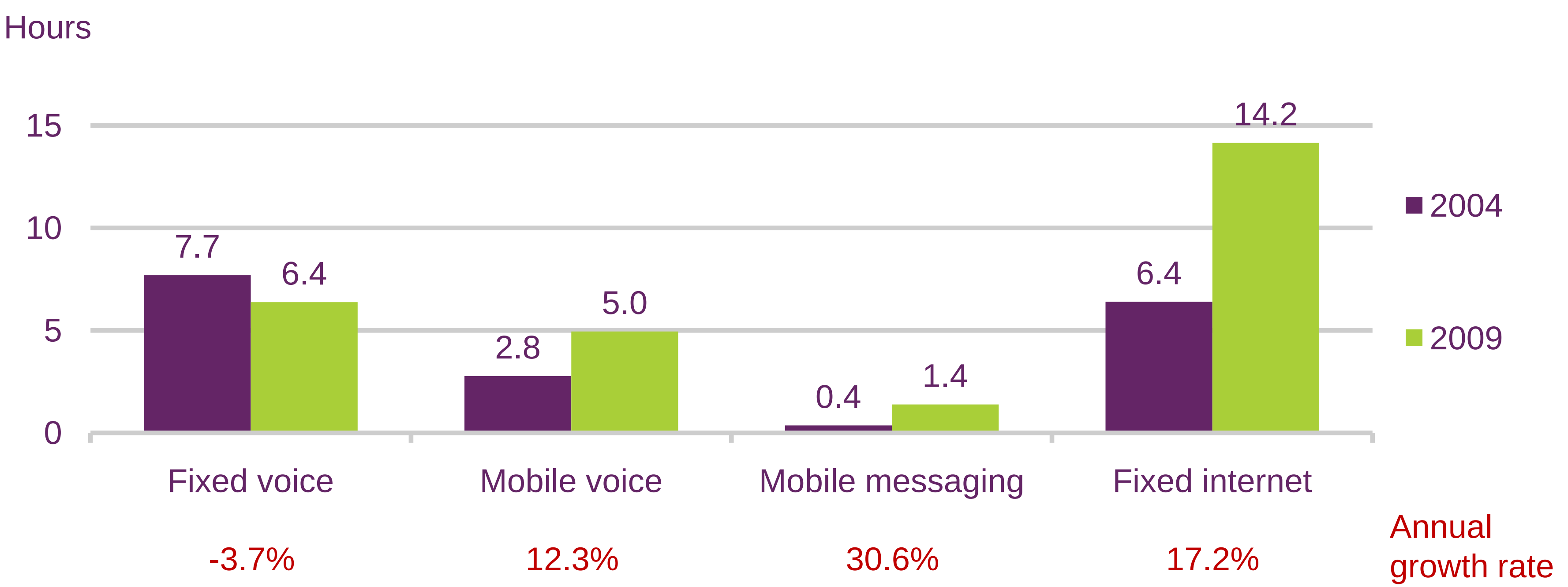
Average household spend on telecoms services



Source: Ofcom / operators / ONS
Notes: Includes estimates where Ofcom does not receive data from operators; adjusted to RPI; includes VAT

Figure 5.65

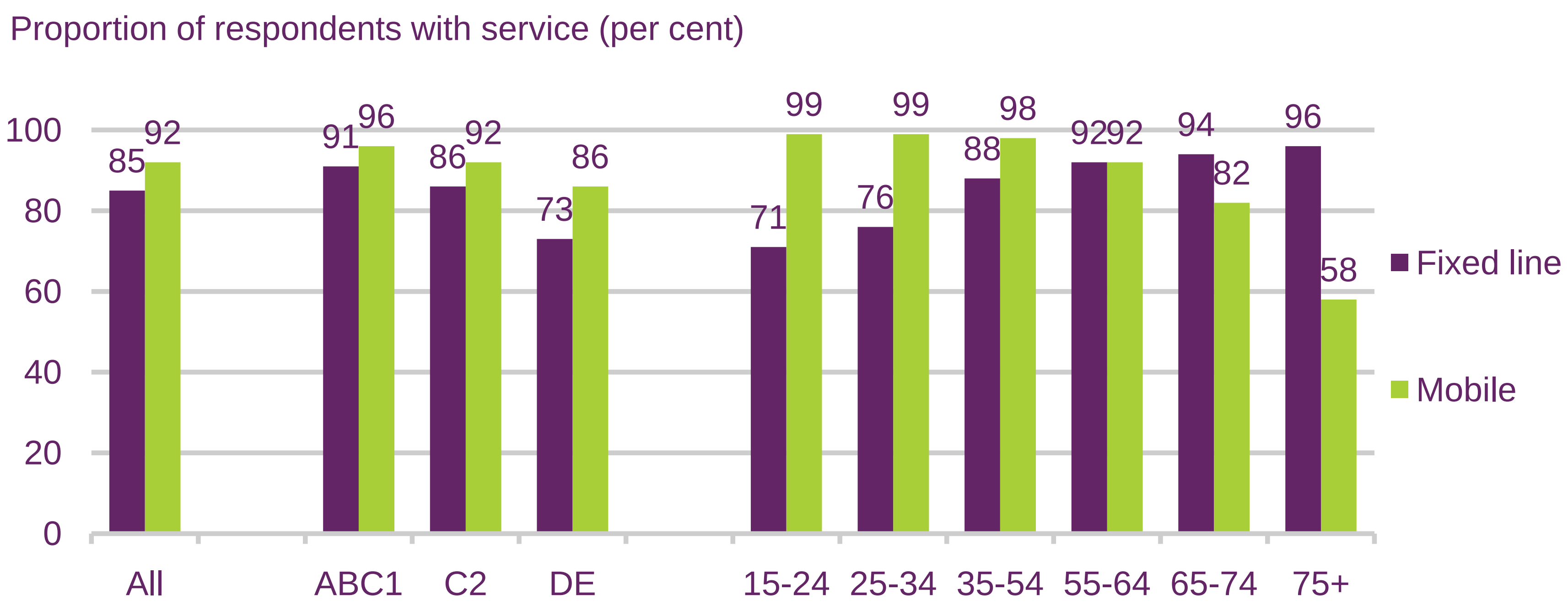
Average monthly time per person spent using telecoms services



Source: Ofcom / operators / Nielsen / UKOM
Note: Includes estimates where Ofcom does not receive data from operators; fixed voice call figures include NTS voice calls; mobile messaging figures assume an average of 35 seconds per message; Ofcom estimate of fixed internet use per person is based on Nielsen's data on the average monthly time spent online at home including the use of applications across the online population only; Nielsen's methodology changed in October 2006 so comparisons before this period should be treated with caution; fixed internet use figures are for May of the following year.

Figure 5.66

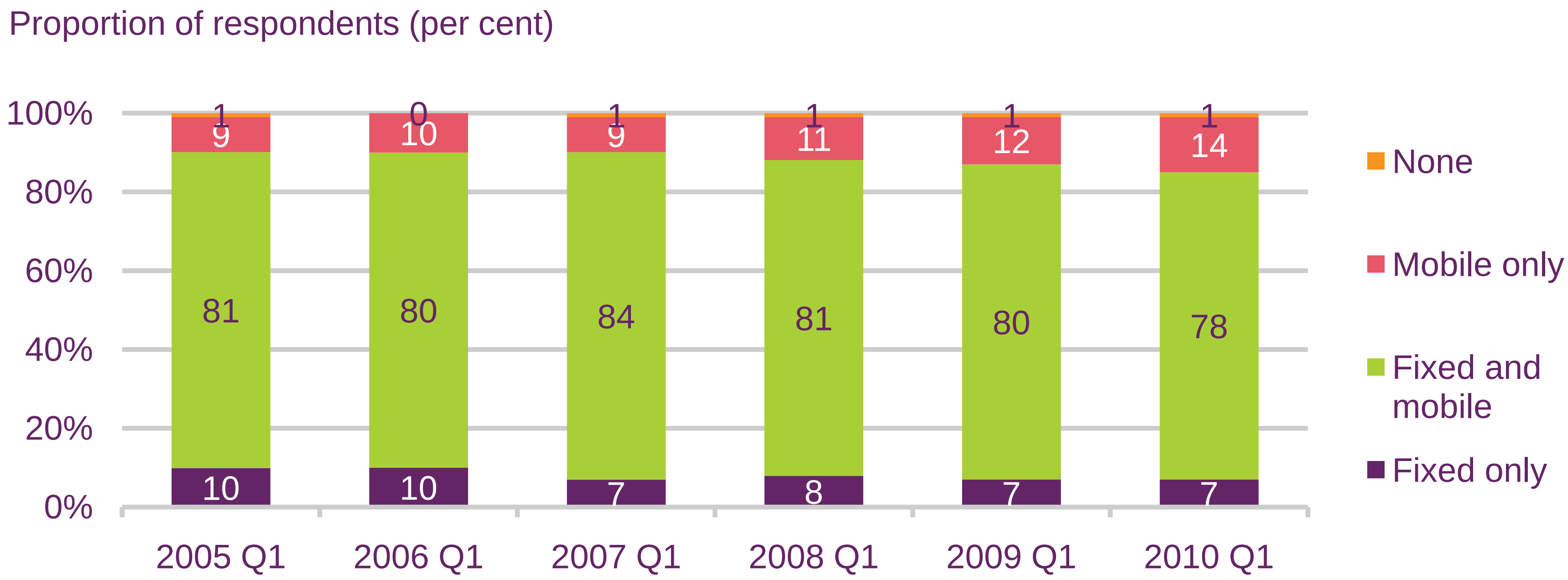
Household telecoms connections, by socio-economic group and age



Source: Ofcom research, Q1 2009
Base: All adults aged 15+

Figure 5.67

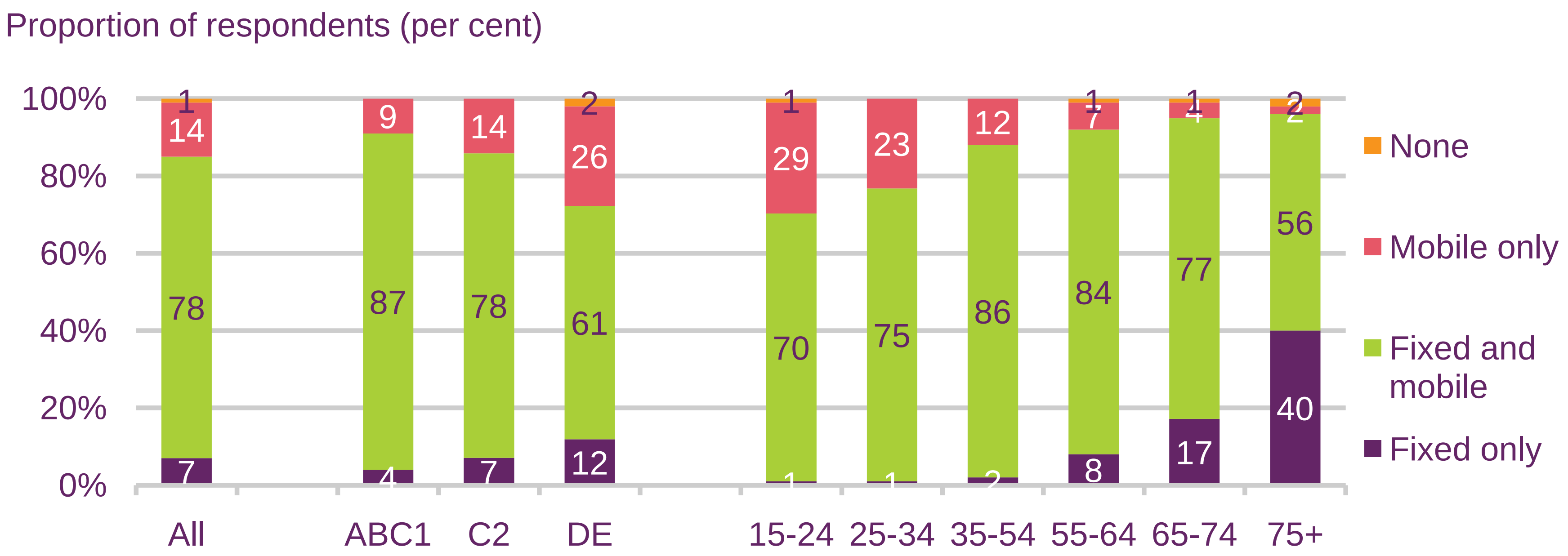
Household penetration of fixed and mobile telephony



Source: Ofcom research
Base: All adults aged 15+

Figure 5.68

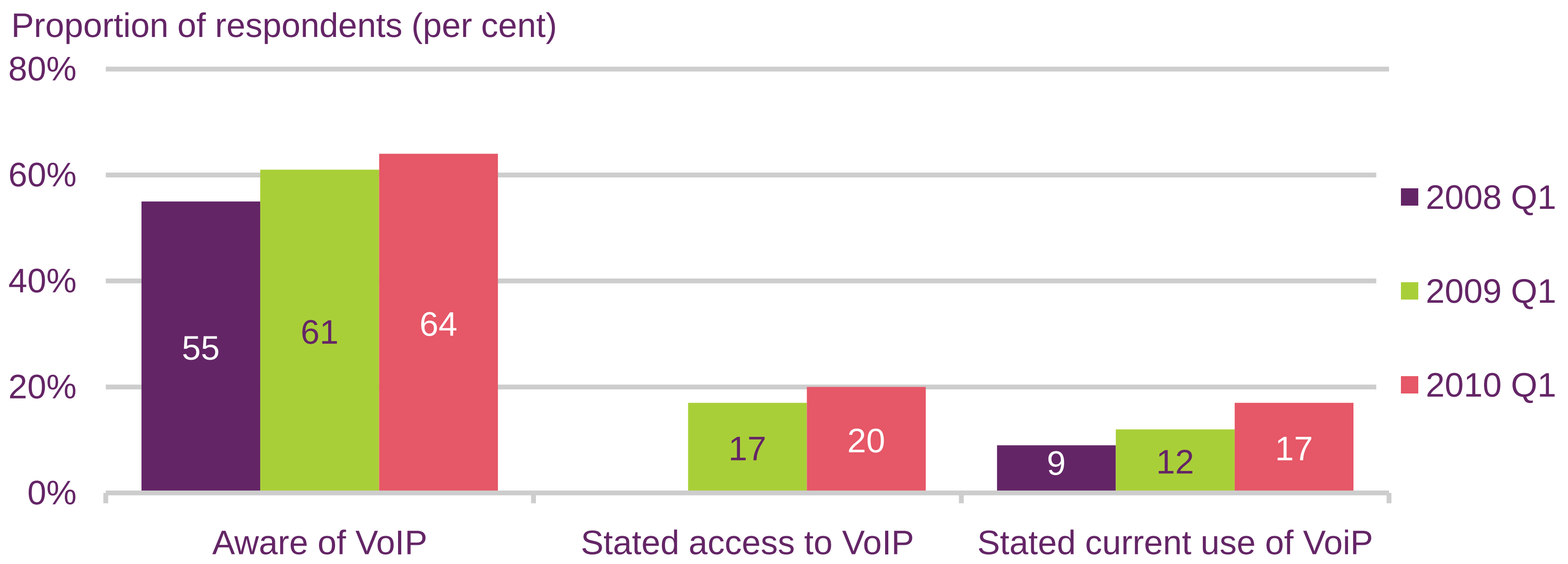
Household penetration of fixed and mobile telephony, by socio-economic group and age



Source: Ofcom research
Base: All adults aged 15+

Figure 5.69

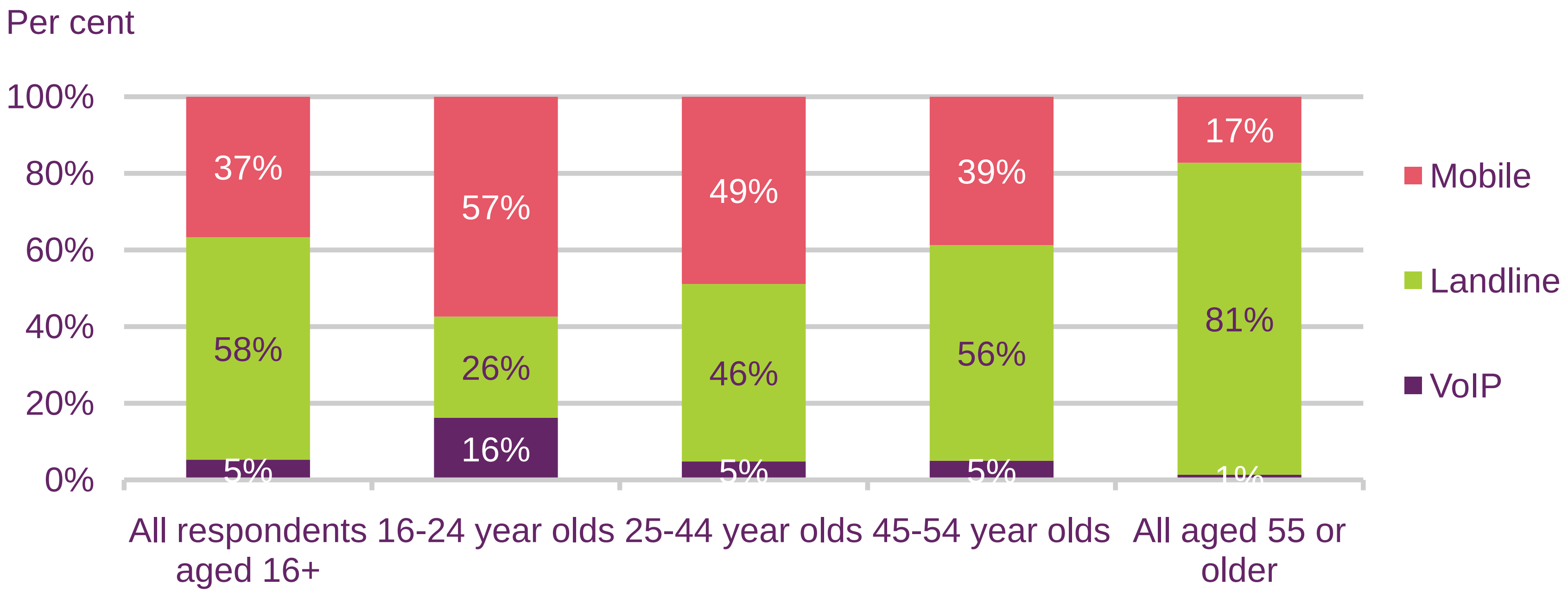
Awareness, stated access to and use of VoIP



Source: Ofcom research
Base: All adults aged 15+
Note: Question wording changed in 2009 so treat comparisons with previous data with caution; stated access not collected in 2008.

Figure 5.70

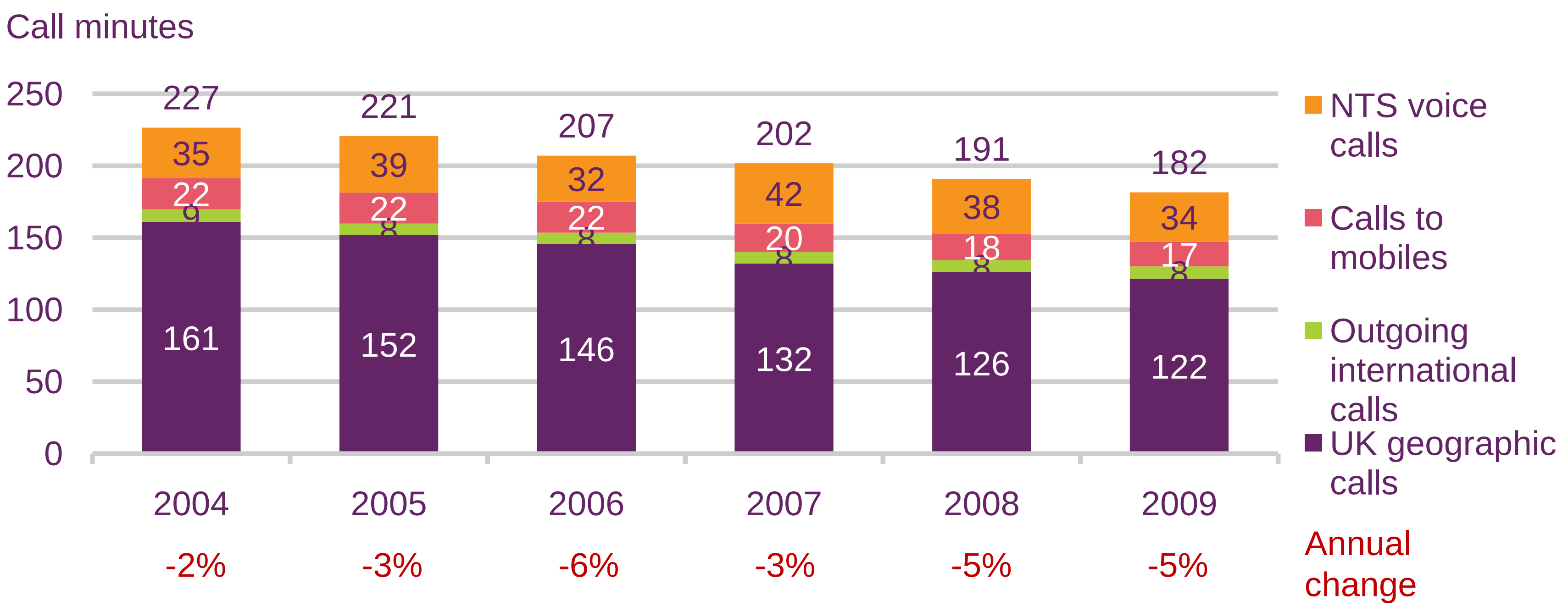
Use of voice communication services in the home



Source: Ofcom research
Base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 5.71

Average monthly outbound fixed voice call volumes per person

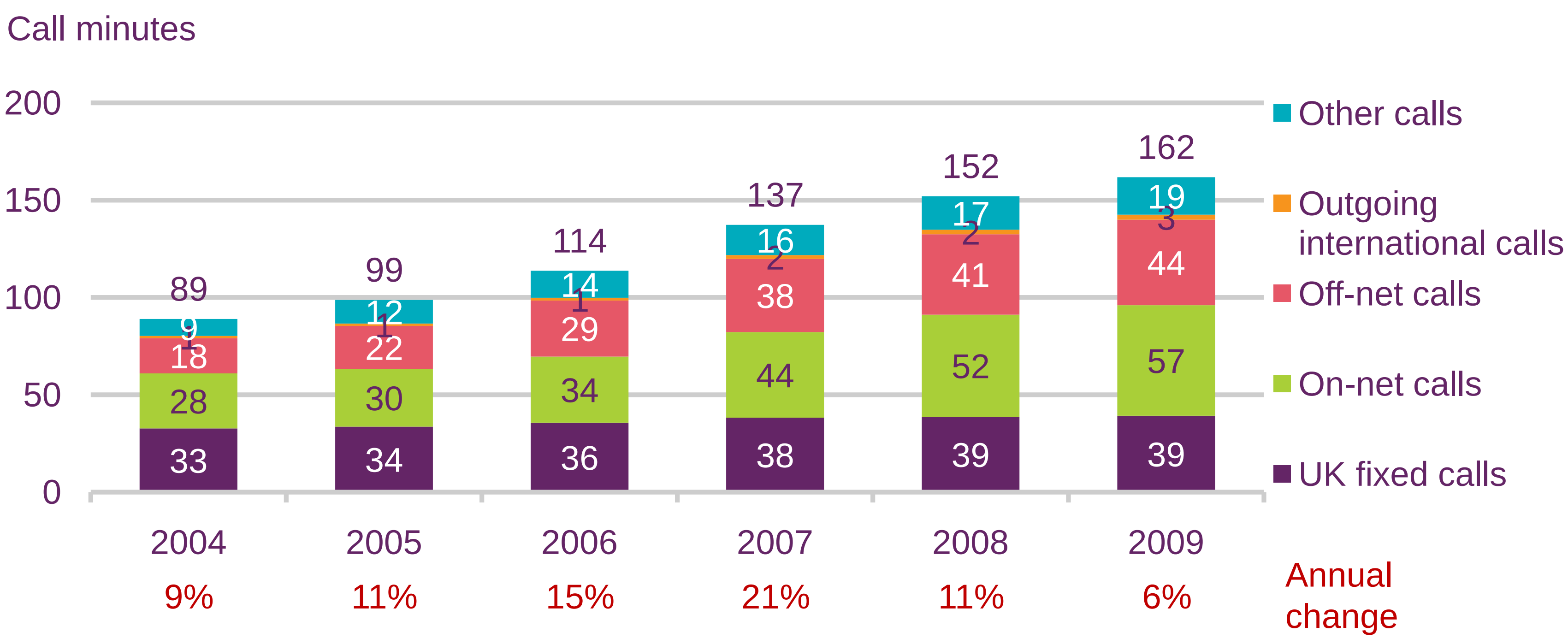


Source: Ofcom / operators

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

Figure 5.72

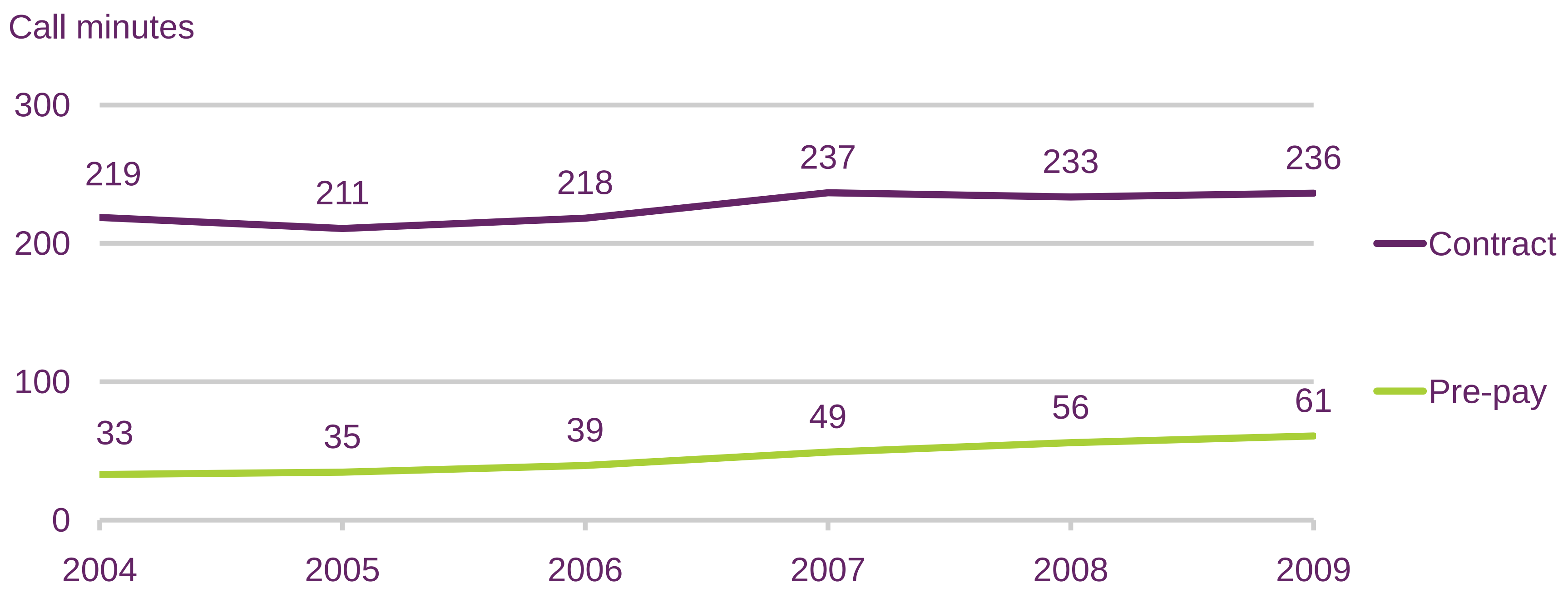
Average monthly outbound mobile voice minutes per person



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes 3UK; calculation excludes mobile broadband connections

Figure 5.73

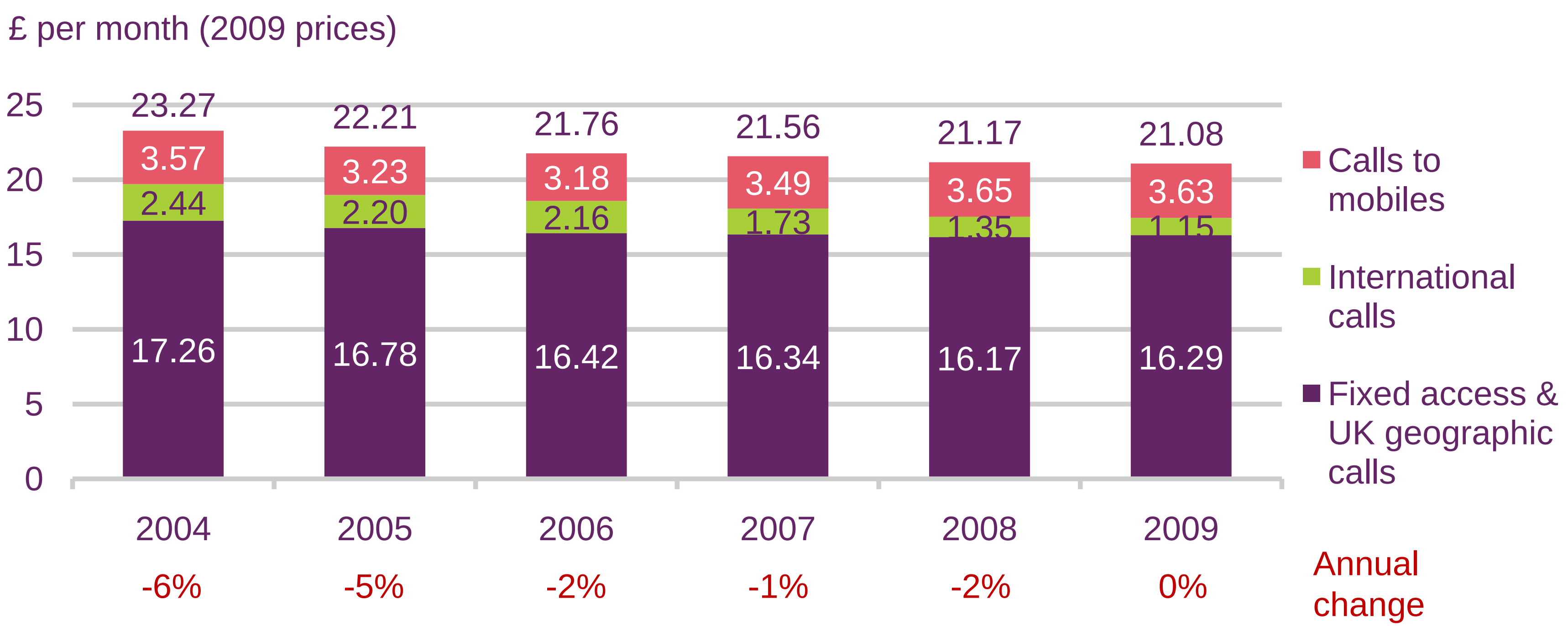
Average monthly outbound mobile call minutes, by subscription type



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes 3UK; calculation excludes mobile broadband connections

Figure 5.74

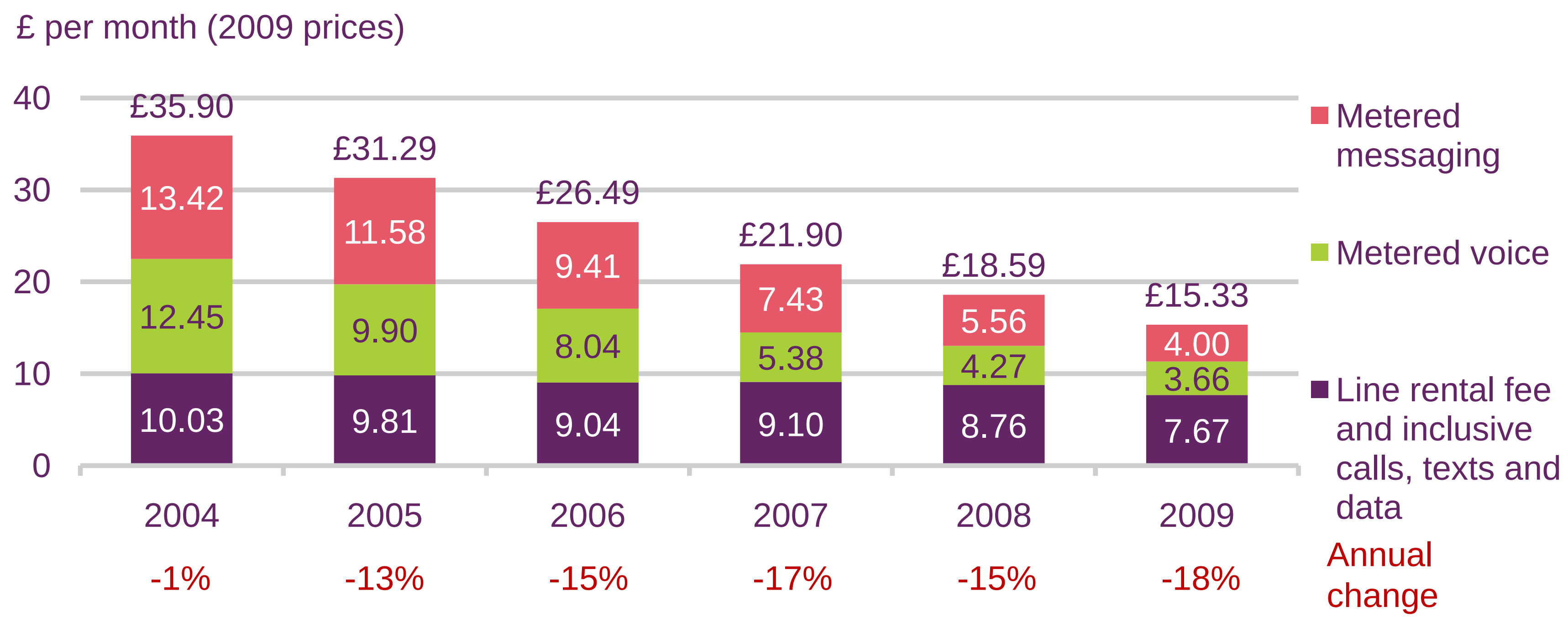
Cost of a basket of residential fixed voice services



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

Figure 5.75

Cost of a basket of mobile services

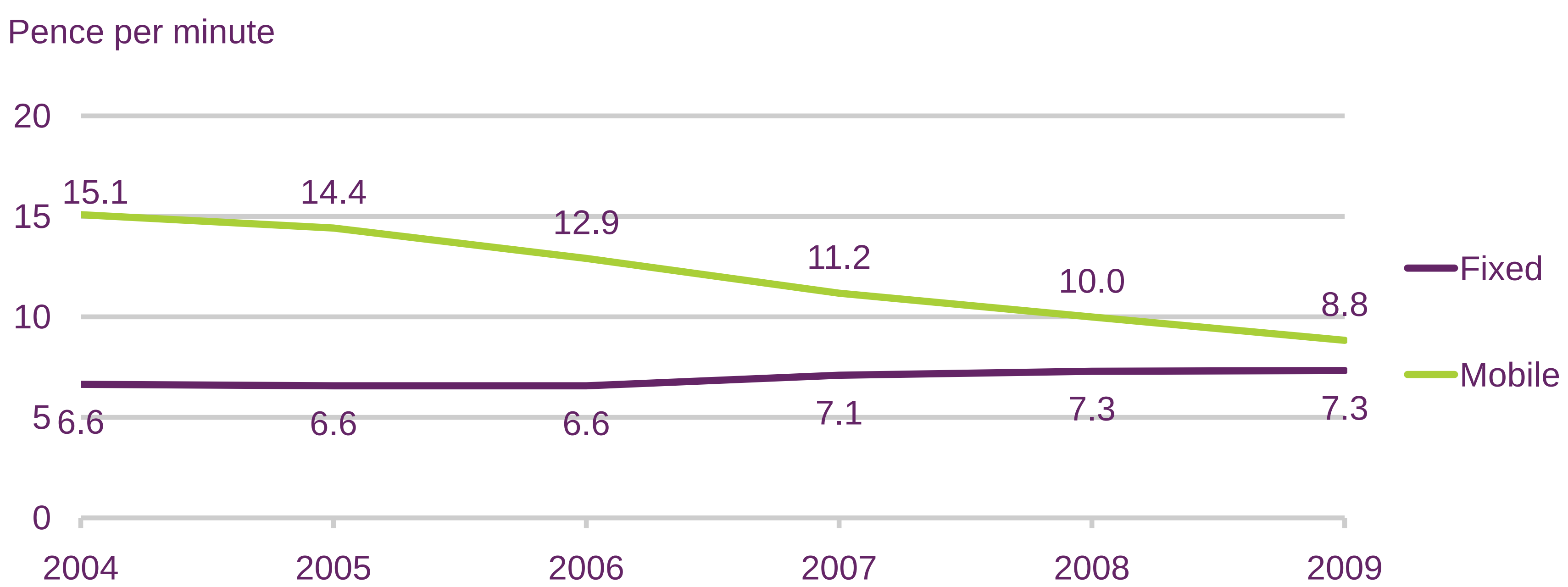


Source: Ofcom / operators

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

Figure 5.76

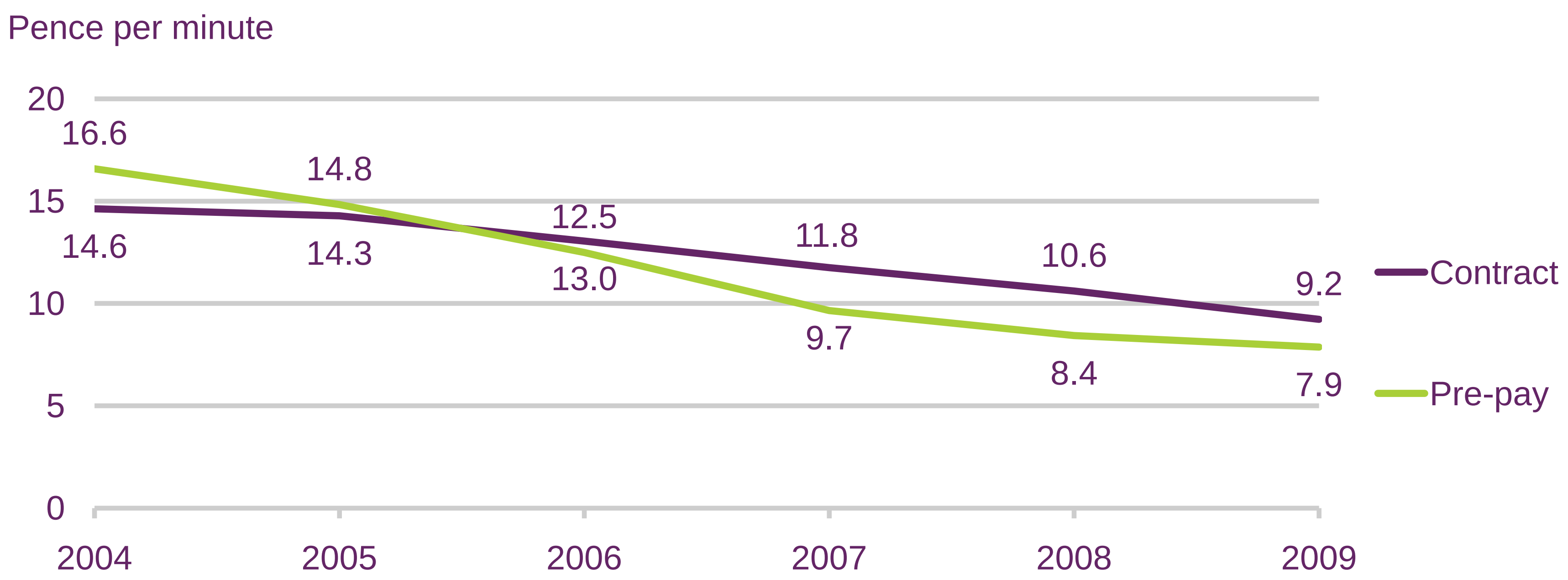
Comparison of average fixed and mobile voice call charges



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

Figure 5.77

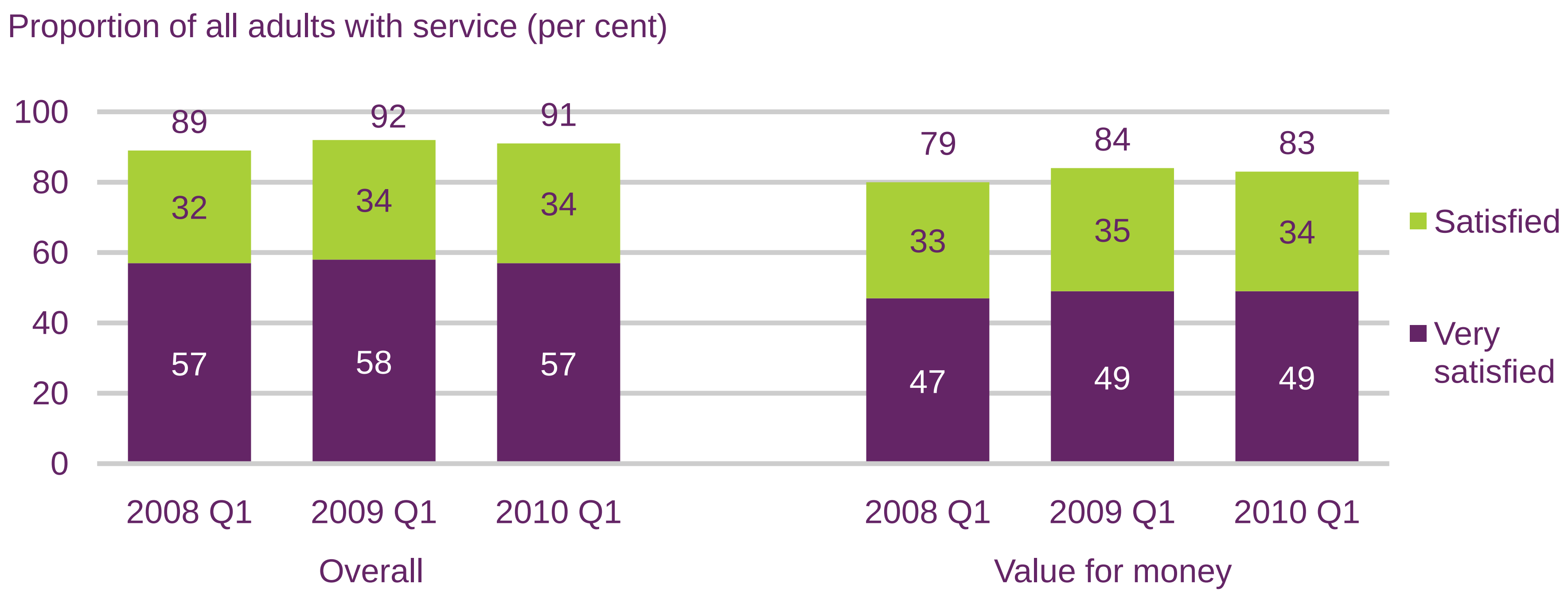
Average mobile cost per voice minute, by customer type



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; contract calculation includes rental element which will often includes a number of inclusive messages and data allowance; calculations use actual minutes of usage

Figure 5.78

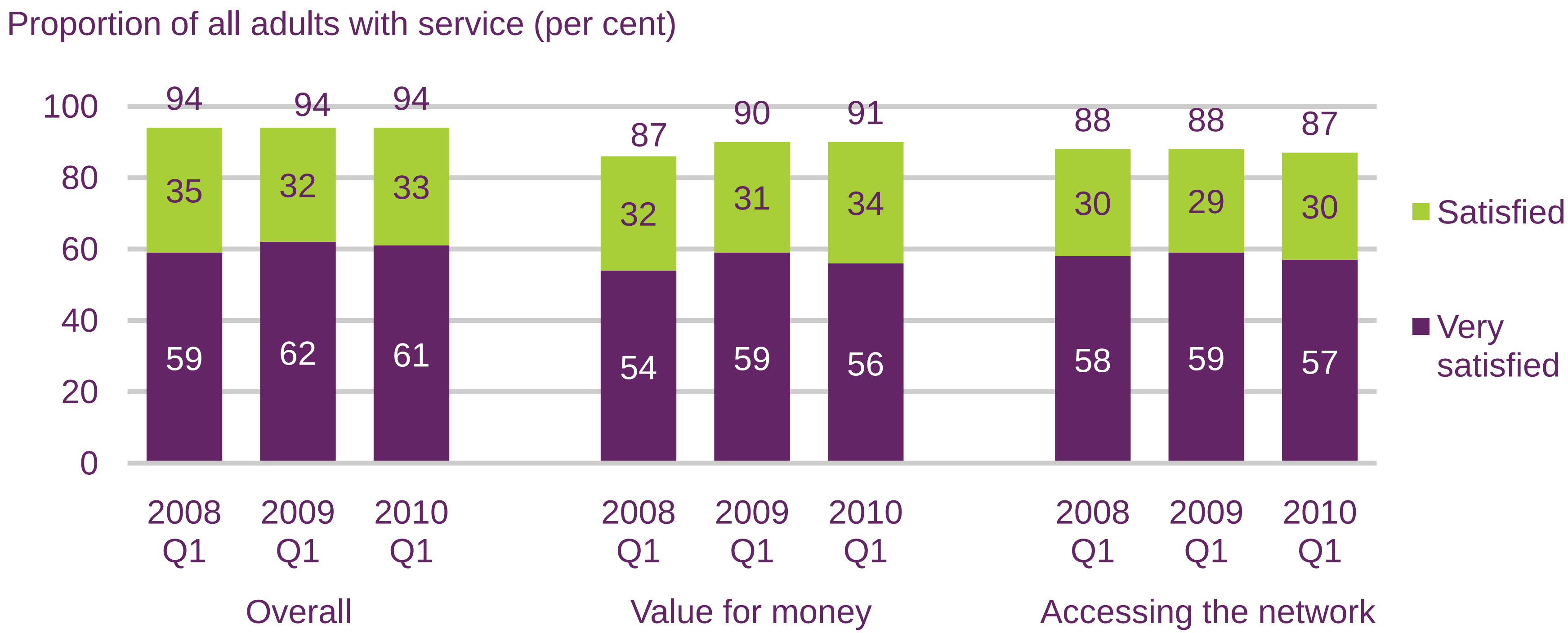
Residential consumer satisfaction with aspects of fixed line service



Source: Ofcom research
Base: All adults aged 15+ with a fixed line phone
Note: Includes only those who expressed an opinion

Figure 5.79

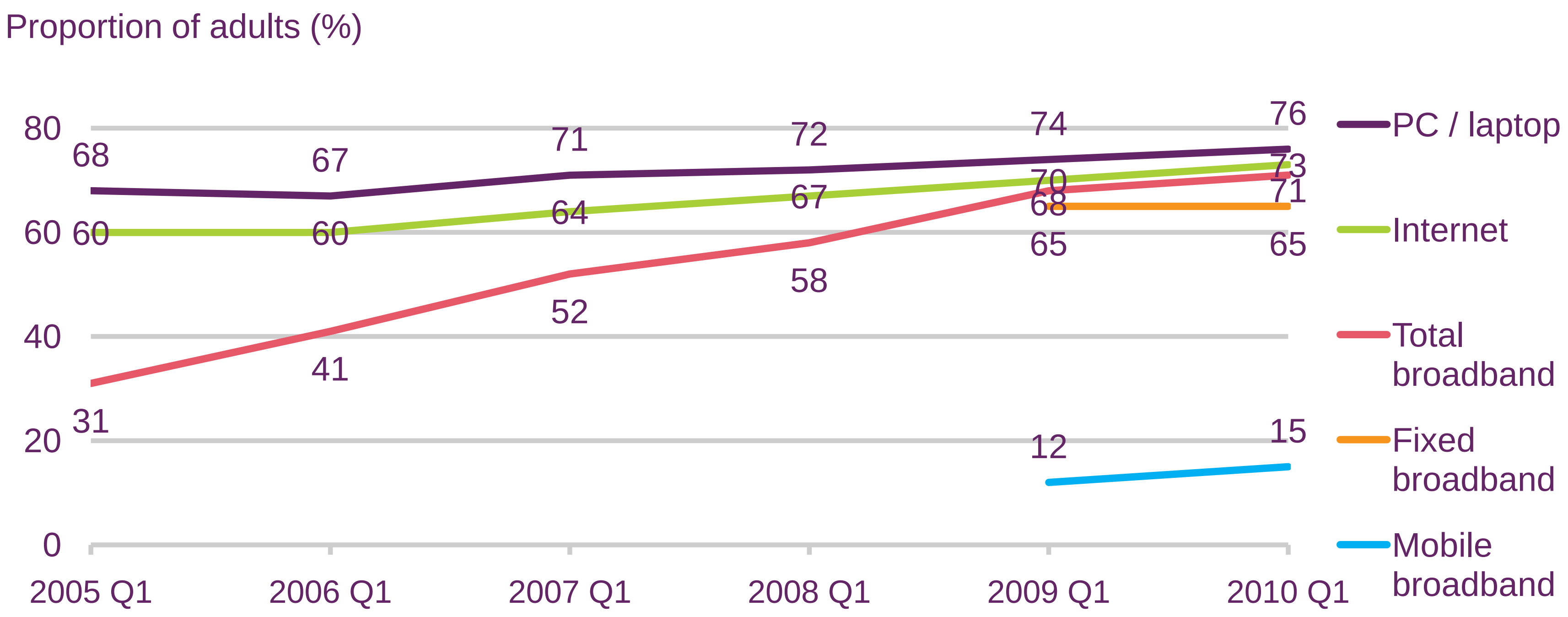
Residential consumer satisfaction with aspects of mobile service



Source: Ofcom research
Base: All adults aged 15+ with a mobile phone
Note: Includes only those who expressed an opinion

Figure 5.80

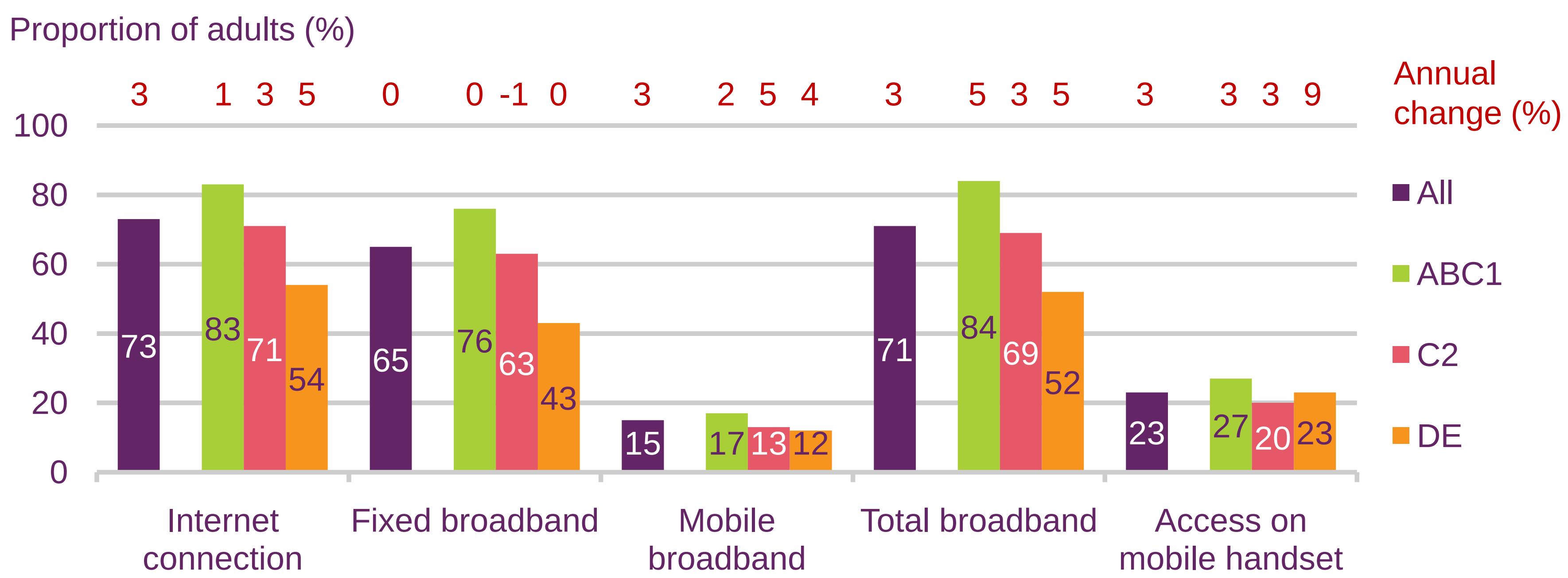
Household PC and internet take-up



Source: Ofcom research
Base: All adults aged 15+

Figure 5.81

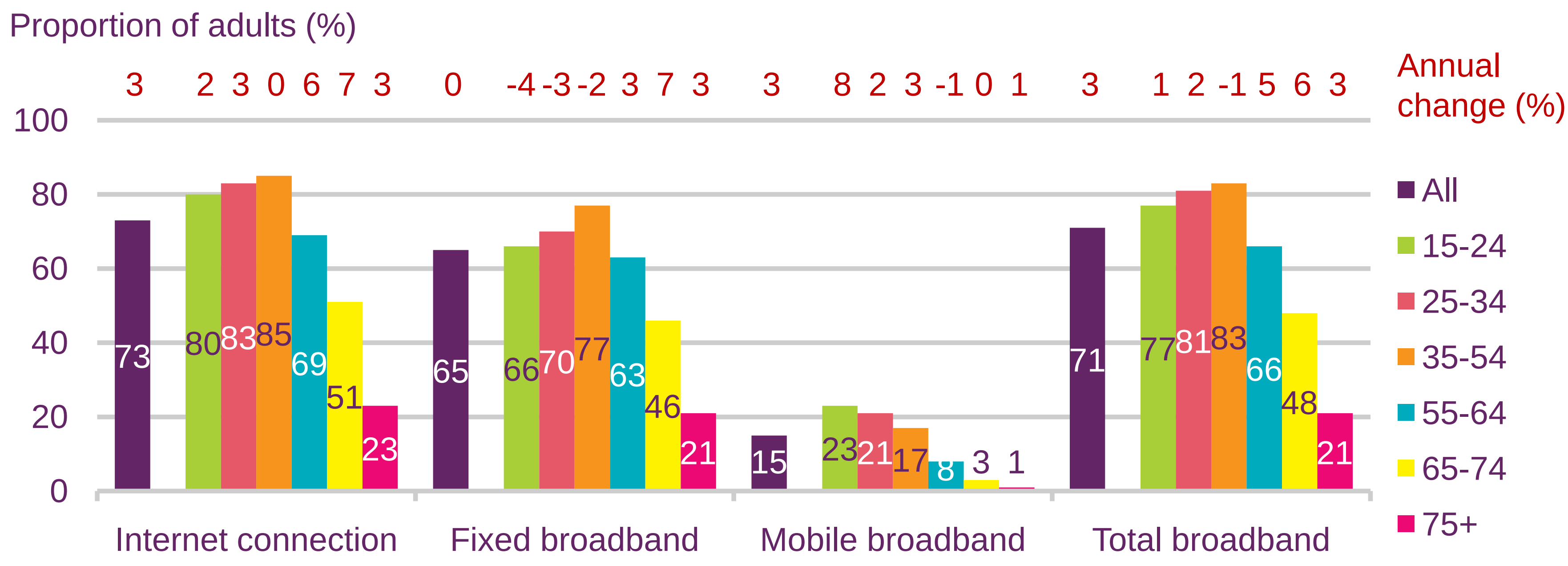
Household take-up of data services, by socio-economic group



Source: Ofcom research, 2010 Q1 data
Base: all adults ages 15+

Figure 5.82

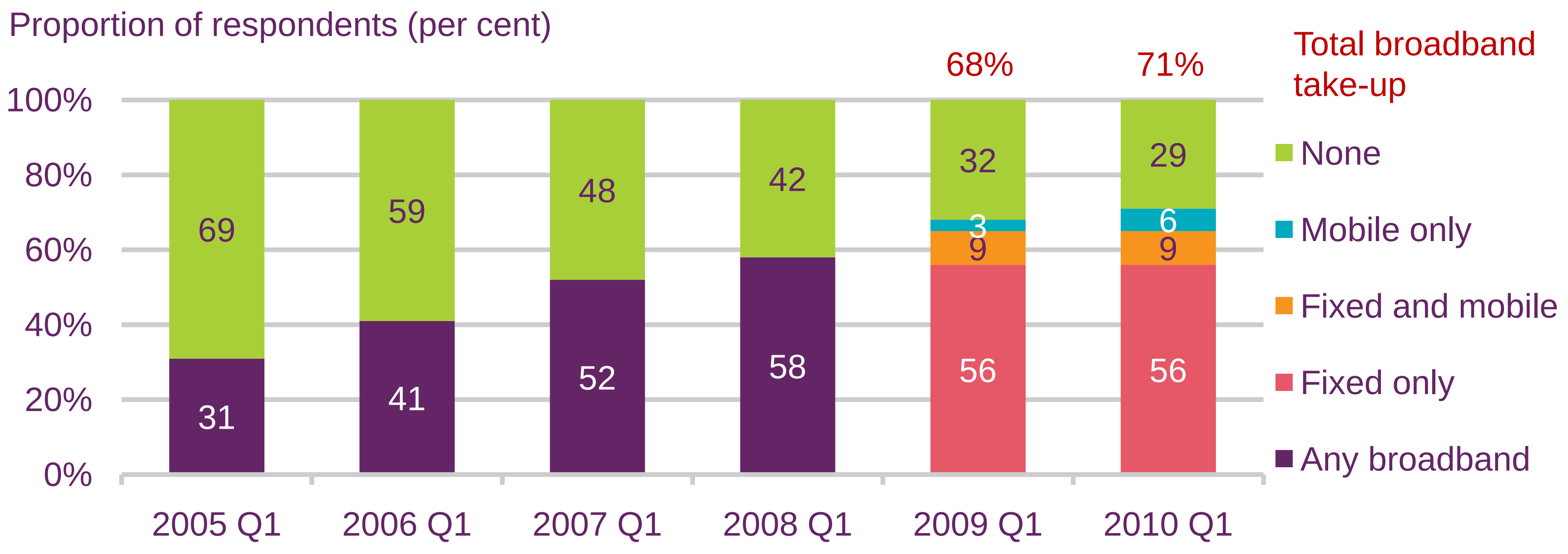
Household take-up of data services, by age



Source: Ofcom research, 2010 Q1 data
Base: all adults ages 15+

Figure 5.83

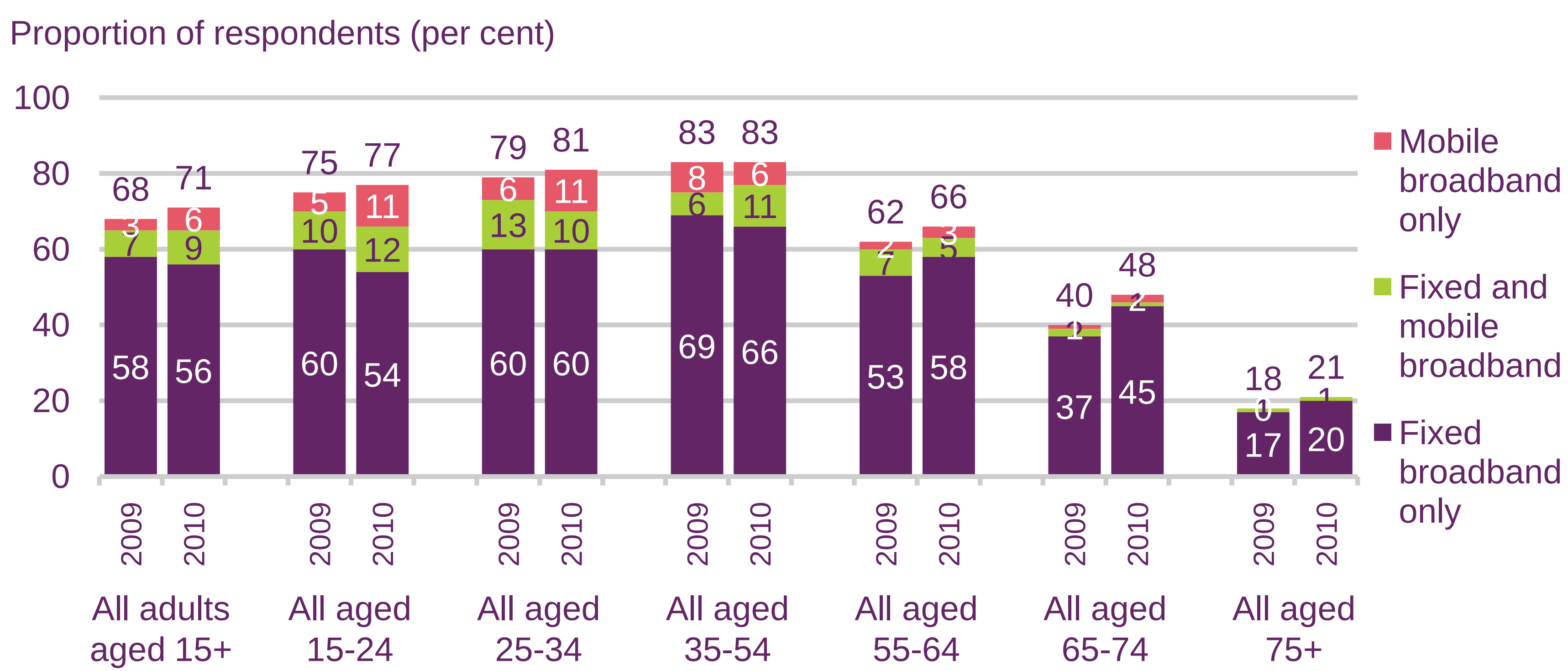
Household penetration of fixed and mobile broadband



Source: Ofcom research
Base: All adults aged 15+

Figure 5.84

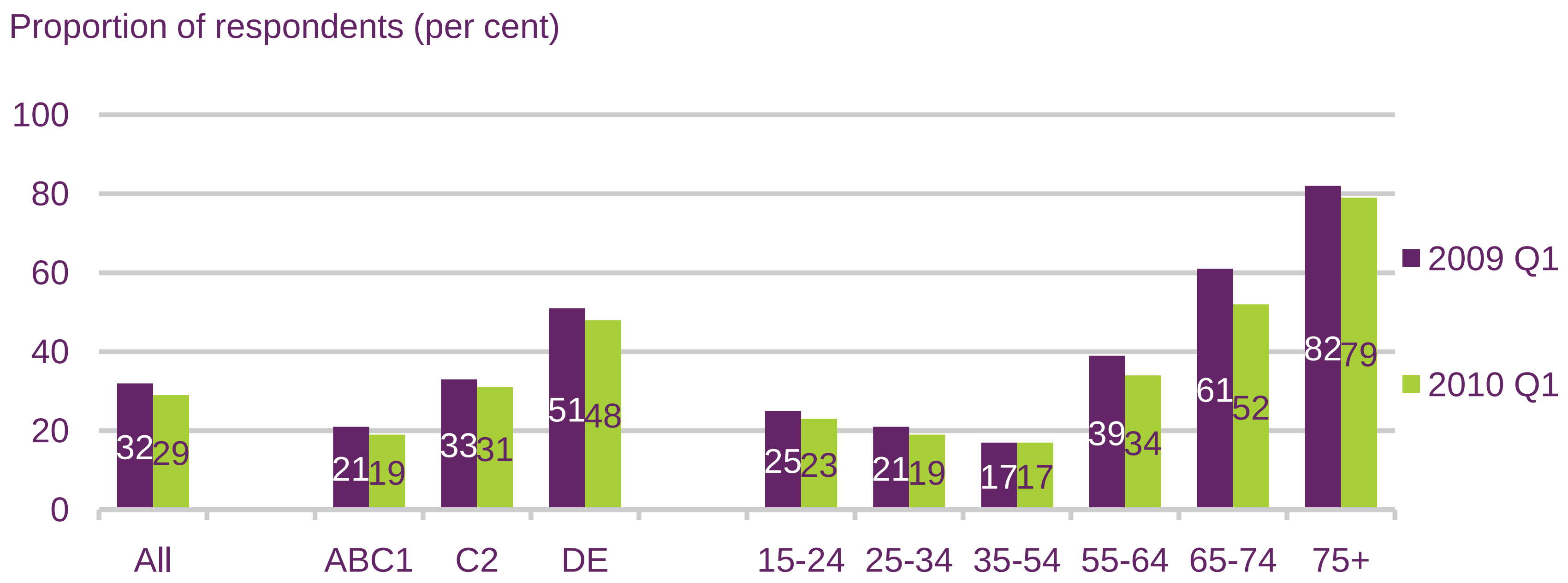
Take-up of fixed and mobile broadband services by age



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 15+

Figure 5.85

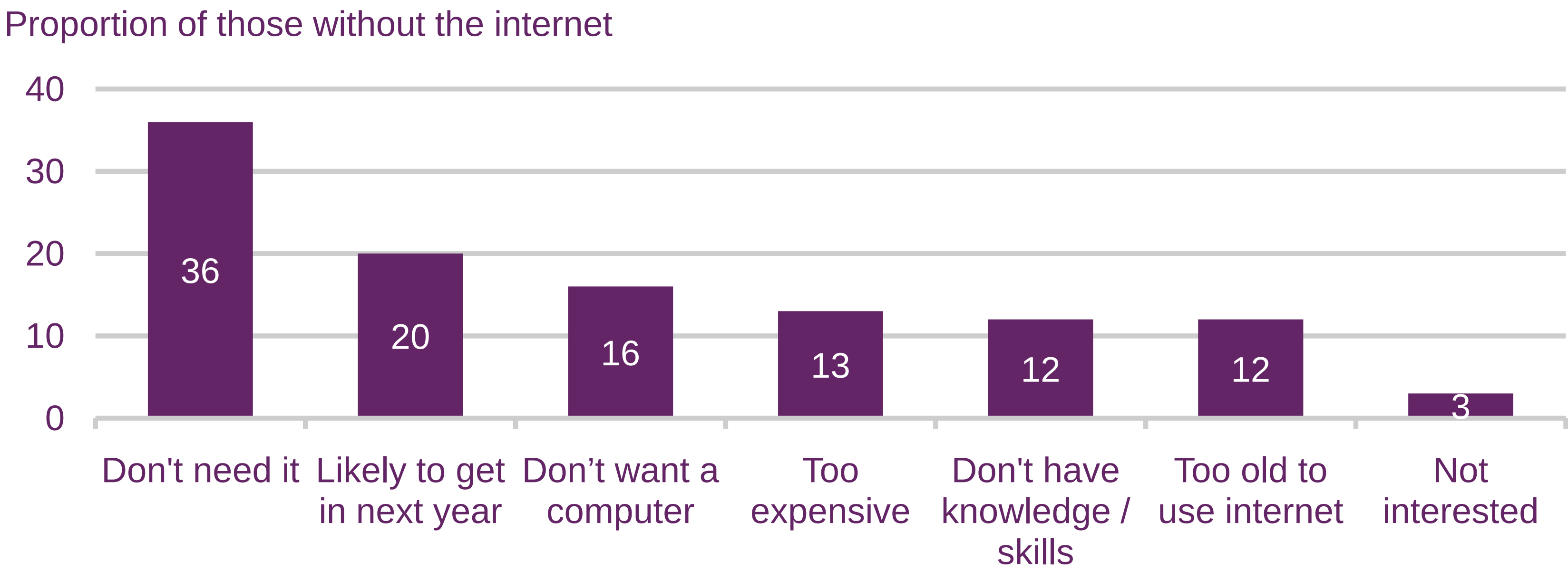
Non-ownership of home broadband, by socio-economic group and age



Source: Ofcom research, Q1 2009
Base: All adults 15+

Figure 5.86

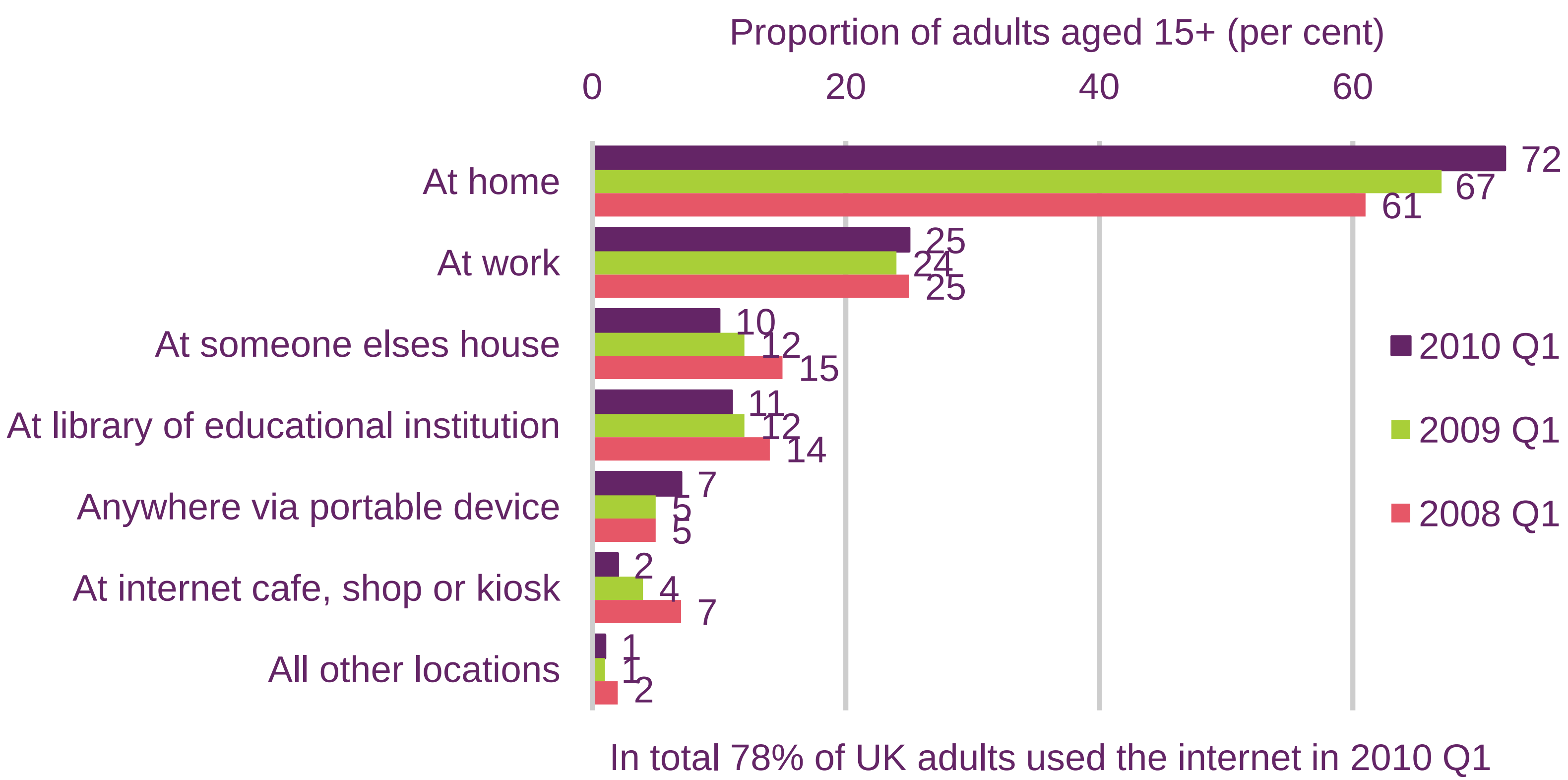
Main reasons for not having a home internet connection



Source: Ofcom research
Note: 4% of people without the internet did not know what their main reason was or provided an ‘other’ reason
Base: All adults without the internet aged 15+

Figure 5.87

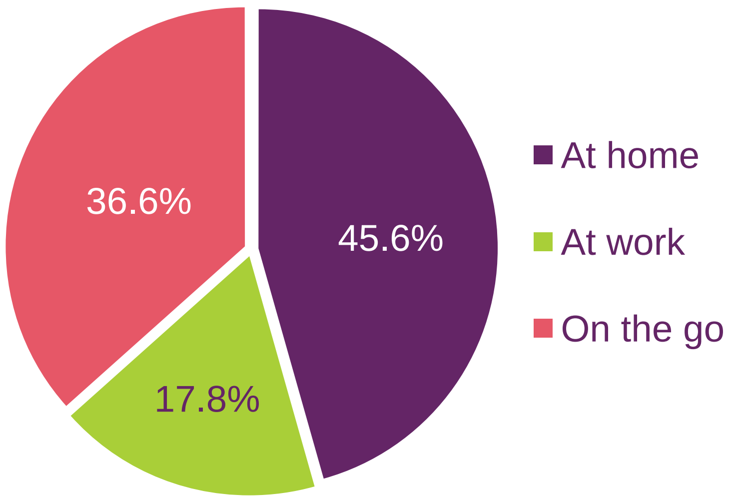
Location of internet access



Source: Ofcom research
Base: All internet users aged 15+

Figure 5.88

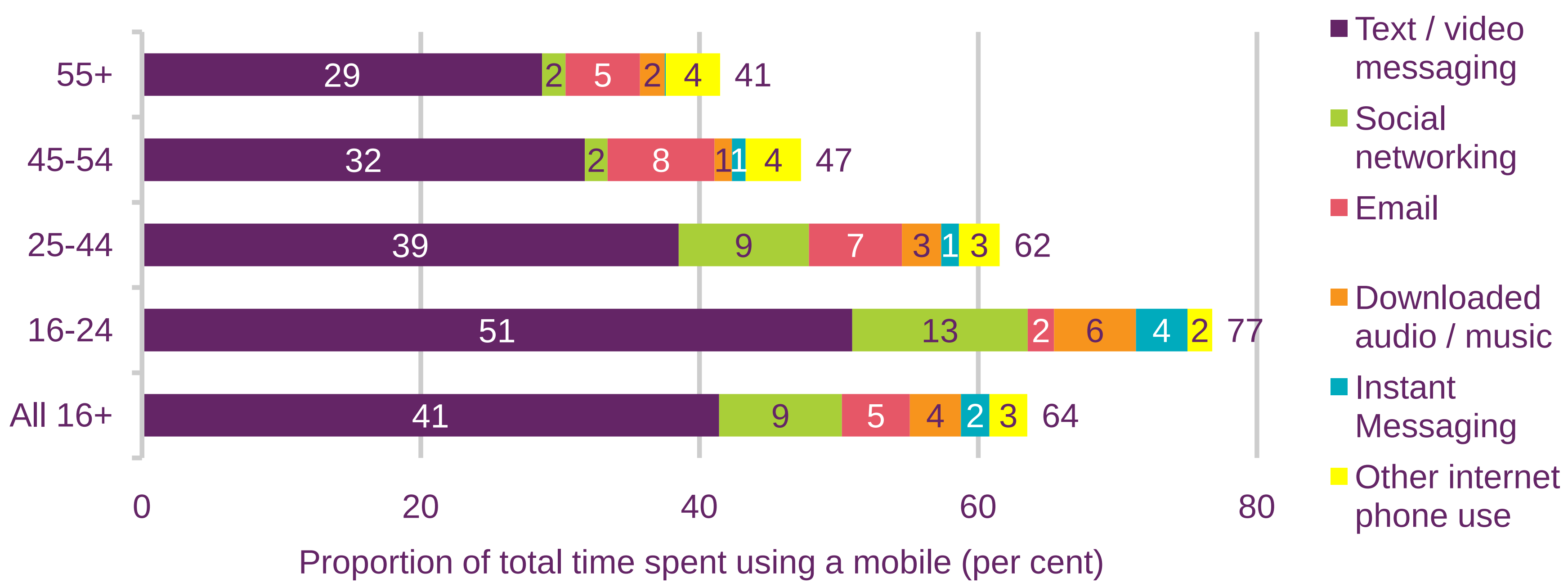
Location of internet access using a mobile device



Source: Cisco IBSG Connected Life Market Watch, 2009

Figure 5.89

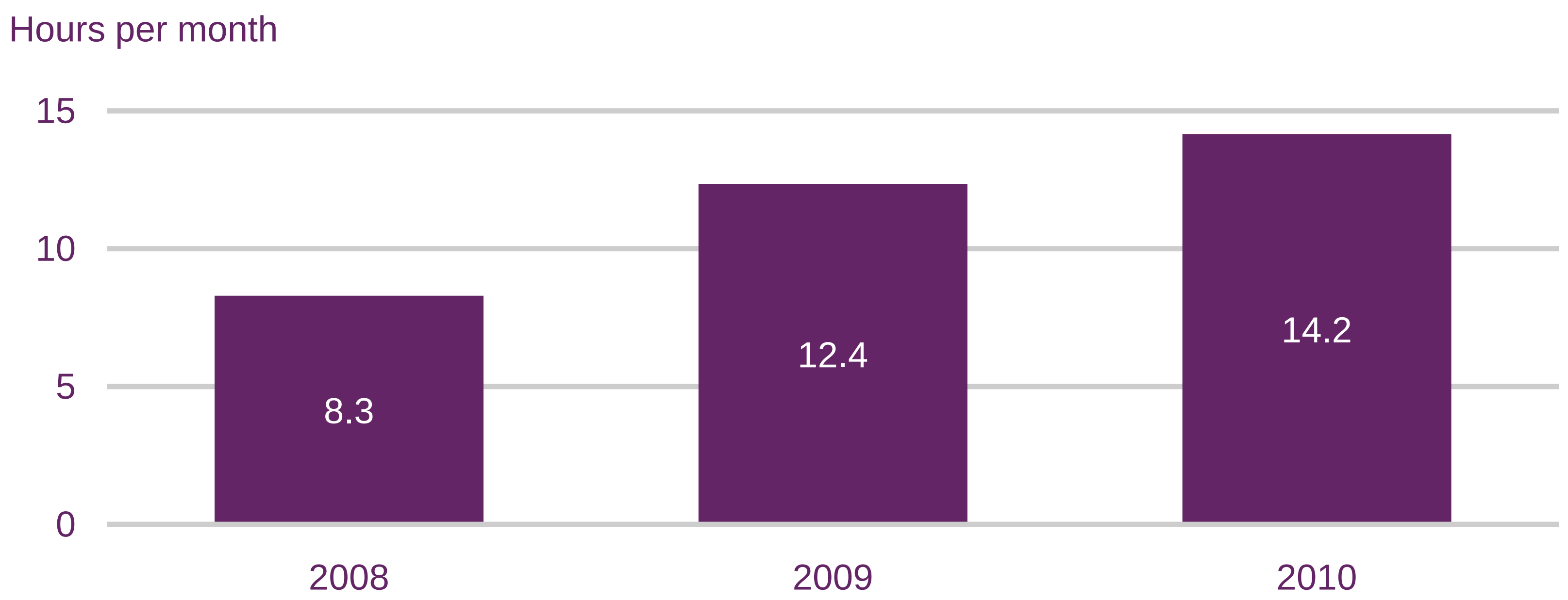
Mobile phone data services use as a proportion of total use



Source: Ofcom research
Base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 5.90

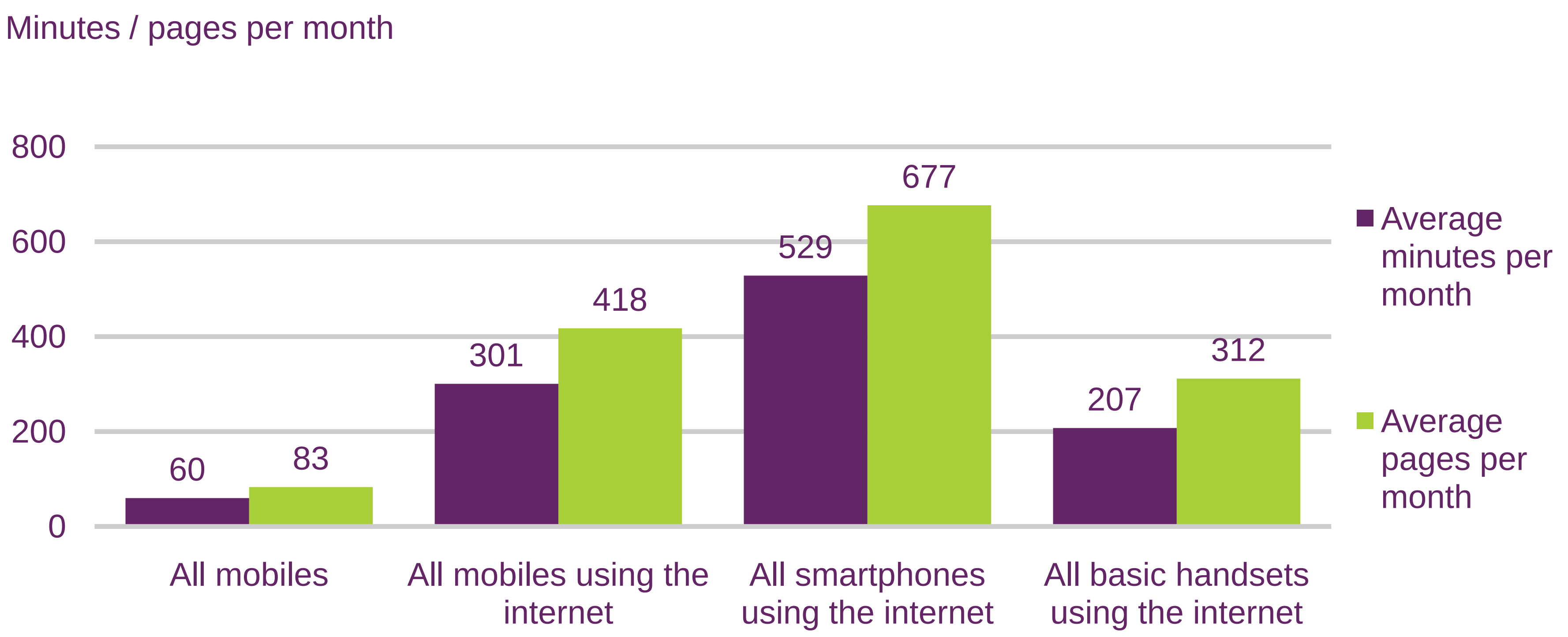
Average PC / internet time online at home, per person



Source: Ofcom / Nielsen / UKOM
Note: Ofcom estimate of fixed internet use per person is based on Nielsen’s data on the average monthly time spent online at home including the use of applications across the online population only; data are for May of each year.

Figure 5.91

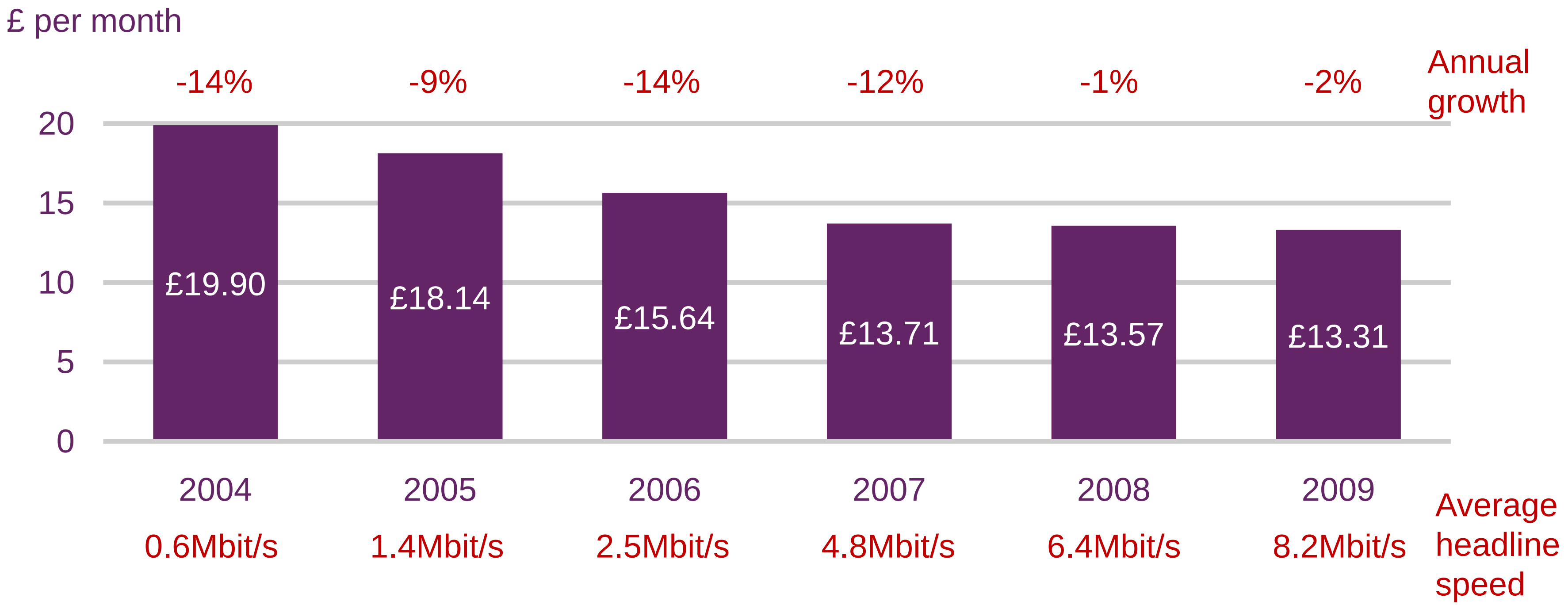
Average internet use per mobile subscription



Source: GSMA Mobile Media Metrics (http://www.gsmworld.com/newsroom/press-releases/2010/4614.htm)
Note: Based on pre-production data for December 2009

Figure 5.92

Estimated average monthly cost of a residential fixed broadband connection



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

Figure 5.93

Lowest cost fixed broadband options from major suppliers, July 2010

Provider	Broadband only	Broadband and fixed calls	Broadband and fixed line	Broadband and mobile	Broadband and pay-TV	Broadband, fixed line and mobile	Broadband, fixed line and pay-TV
AOL	£14.99 [1]	£9.99 [1]	£21.24	-	-	-	-
BSkyB	-	-	-	-	-	-	£29.00
BT	-	-	£26.03	-	-	-	£44.53
O2	£7.50 [1, 2]	-	-	£7.50 [1,2]	-	-	-
Orange Home	£9.00[1, 2]	-	£20.00	£9.00 [2]	-	£17.50 [2]	-
Plusnet	£6.49 [1]	-	£17.74	-	-	-	-
TalkTalk	-	-	£18.48	-	--	-	-
Virgin Media	£20.00		£24.49	£30.00	£30.50	£34.49	£25.99
Vodafone	-	-	£25.00	-	-	£25.00 [2]	-

Source: PurePricing UK Broadband, Bundling and Convergence Update, July 2010
Notes: 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, plus availability of TV channels included within packages may differ by operator and option; 1 Also requires BT fixed line rental at £11.54 a month; 2 plus cost of mobile tariff

Figure 5.94

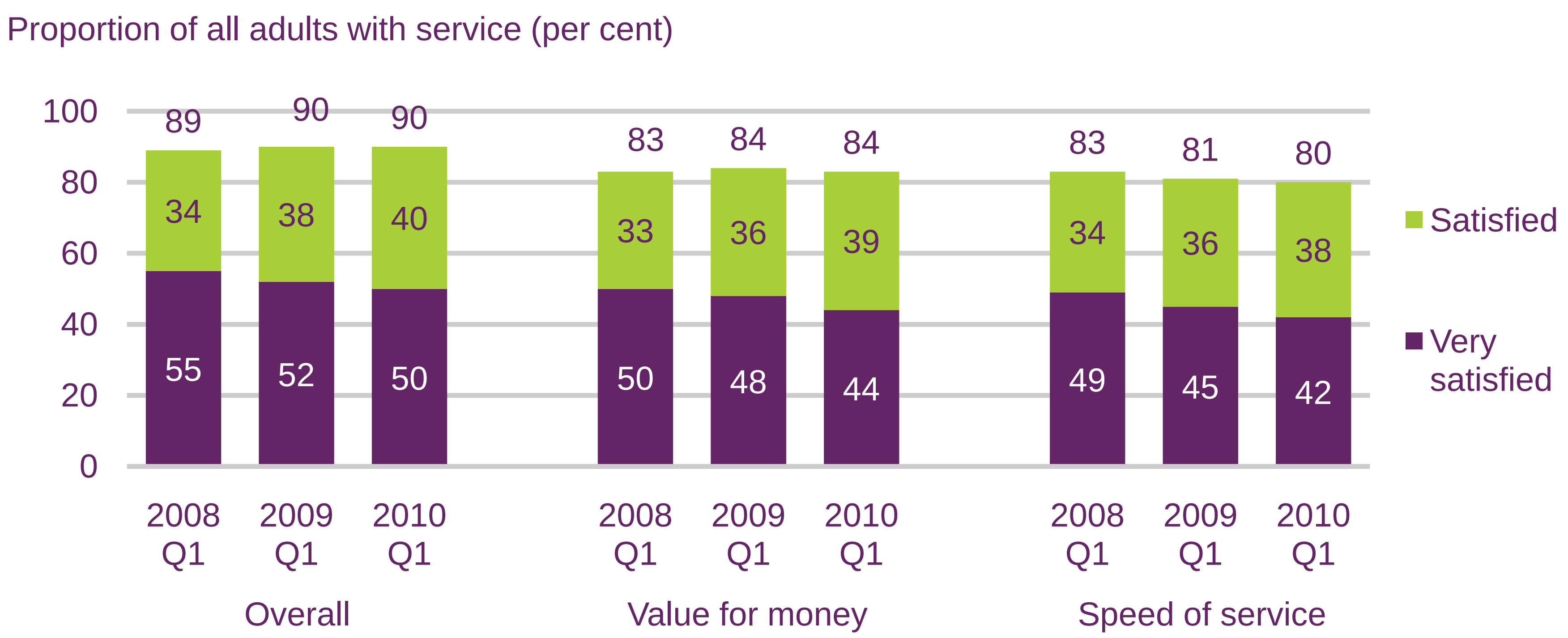
Lowest cost standalone mobile broadband contracts by provider

Provider		Monthly charge	Data allowance	Minimum contract length	Charges above allowance	WiFi hotspot use
Vodafone	2009	£14.68	1GB	1 month	£14.68 / GB	Not included
	2010	£15.00	3GB	1 month	£15.00 / GB	Not included
O2	2009	£14.69	3GB	1 month	19.6p / MB	Unlimited
	2010	£10.00	1GB	1 month	2.4p / MB	Unlimited
T-Mobile	2009	£14.68	3GB fair use	18 months	n/a	Unlimited
	2010	£15.00	3GB fair use	18 months	n/a	Unlimited
Orange	2009	£9.79	1GB	18 months	1.43p / MB	Not included
	2010	£10.00	1.5GB	18 months	2p / MB	Not included
3UK	2009	£9.79	1GB	12 months	10p / MB	Not included
	2010	£7.50	1GB	18 months	10p / MB	Not included
Virgin Mobile	2009	£14.68	3GB	18 months	£14.68 / GB	Not included
	2010	£10.00	1GB	2 months	£15 / GB	Not included

Source: PurePricing
Note: Data as at June of each year

Figure 5.95

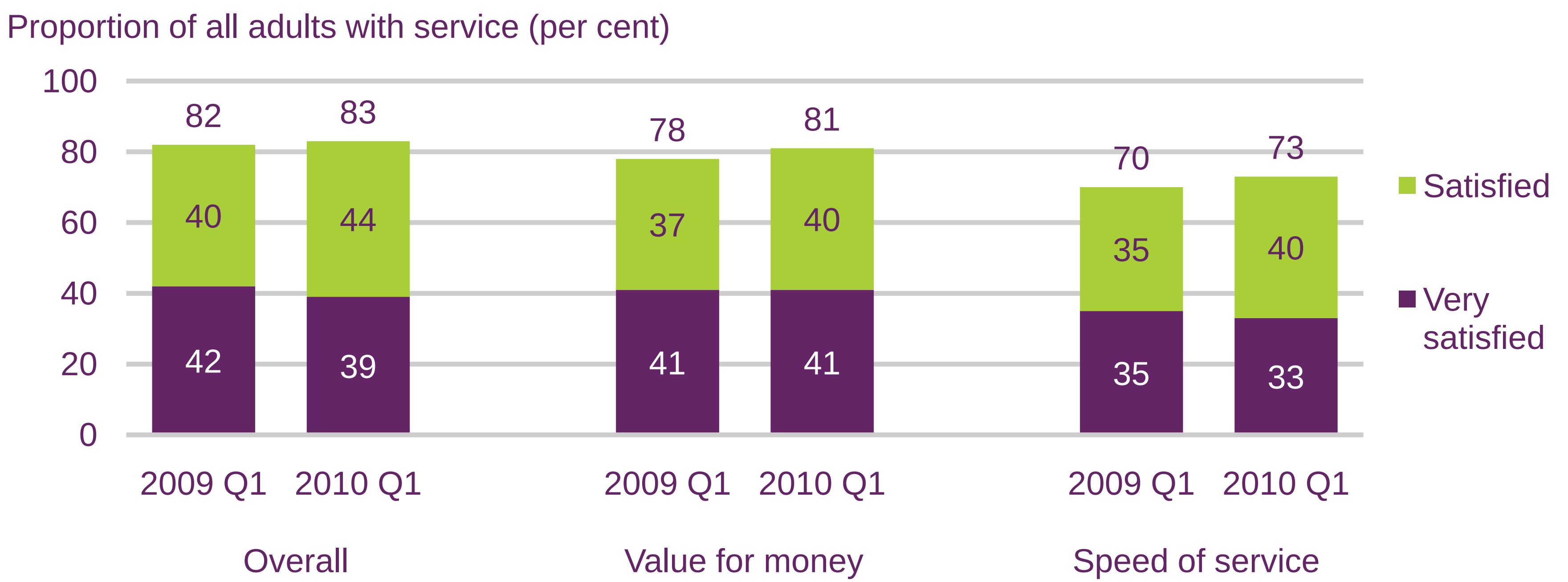
Residential consumer satisfaction with aspects of fixed broadband service



Source: Ofcom research
Base: All adults aged 15+ with a fixed broadband connection
Note: Includes only those who expressed an opinion

Figure 5.96

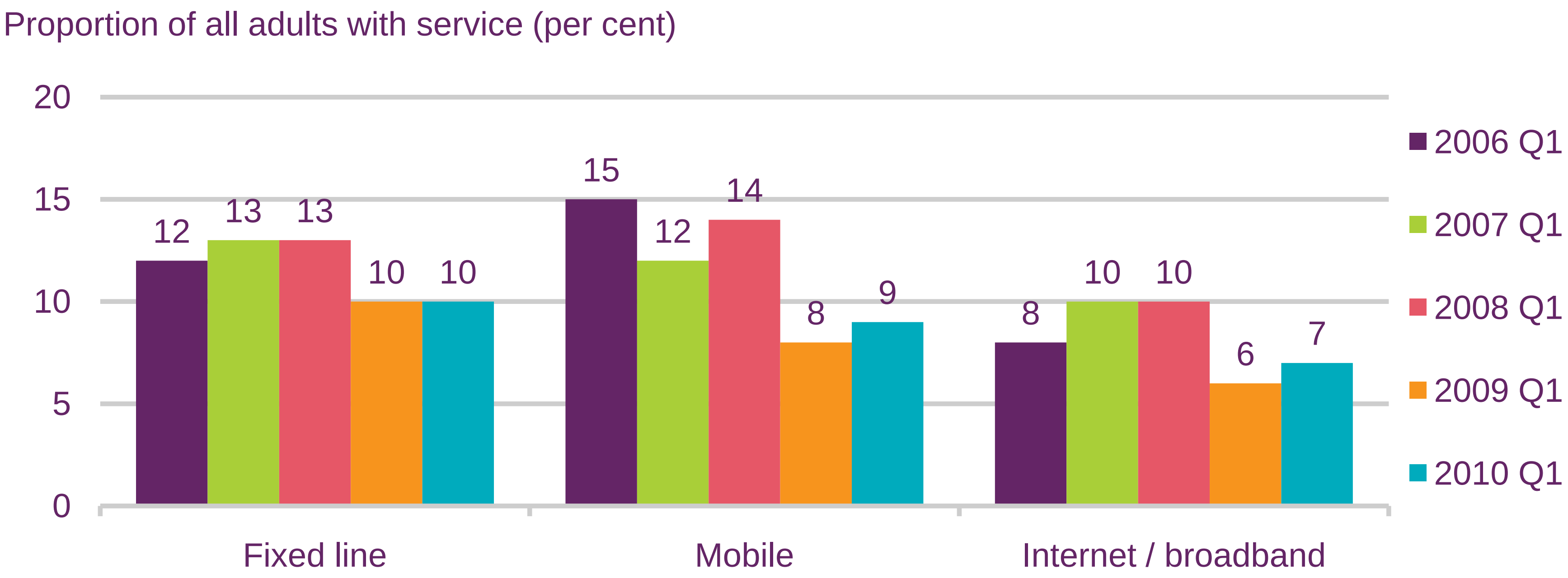
Residential consumer satisfaction with aspects of mobile broadband service



Source: Ofcom research
Base: All adults aged 15+ with a mobile broadband connection
Note: Includes only those who expressed an opinion

Figure 5.97

Proportion of consumers who switched provider in the previous 12 months



Source: Ofcom research

Note: 2008 and 2009 data is the proportion of broadband consumers who had changed broadband provider in the last 12 months and is not directly comparable with previous data which is the proportion of internet users who had switched; 2009 data is based on fixed broadband consumers; switching when moving home is excluded from this data.