Industry metrics and summary

Figure 5.1 UK telecoms industry: key statistics

	2007	2008	2009	2010	2011	2012
Total operator-reported revenue (£bn)	42.1	42.5	41.3	40.4	39.5	38.8
Operator-reported retail revenue (£bn) (excl. CDS)	28.5	28.9	27.9	27.4	27.3	27.5
Operator-reported wholesale revenue (£bn)	10.3	10.5	10.1	9.7	8.8	7.8
Average monthly household telecoms spend (2012 prices) (£)	88.38	85.71	82.07	79.62	78.94	80.25
Fixed access and call revenue (£bn)	10.4	10.2	9.6	9.3	8.8	8.5
Fixed internet revenue (£bn)	3.2	3.2	3.3	3.2	3.4	3.7
Fixed lines (millions)	34.5	34.2	33.5	33.4	33.3	33.1
Fixed broadband connections (millions)	15.6	17.3	18.2	19.5	20.6	21.7
Superfast broadband connections (millions)	0.0	0.0	0.0	0.2	1.1	3.3
Fixed voice call minutes (billions)	149	141	128	123	111	103
Mobile retail revenues (£bn)	15.0	15.5	14.9	14.9	15.1	15.3
Mobile voice call minutes (billions)	105	115	121	125	124	122
SMS messages sent (billions)	66	85	104	128	151	152
Active mobile subscribers (millions)	73.8	76.5	80.3	81.2	81.6	82.7

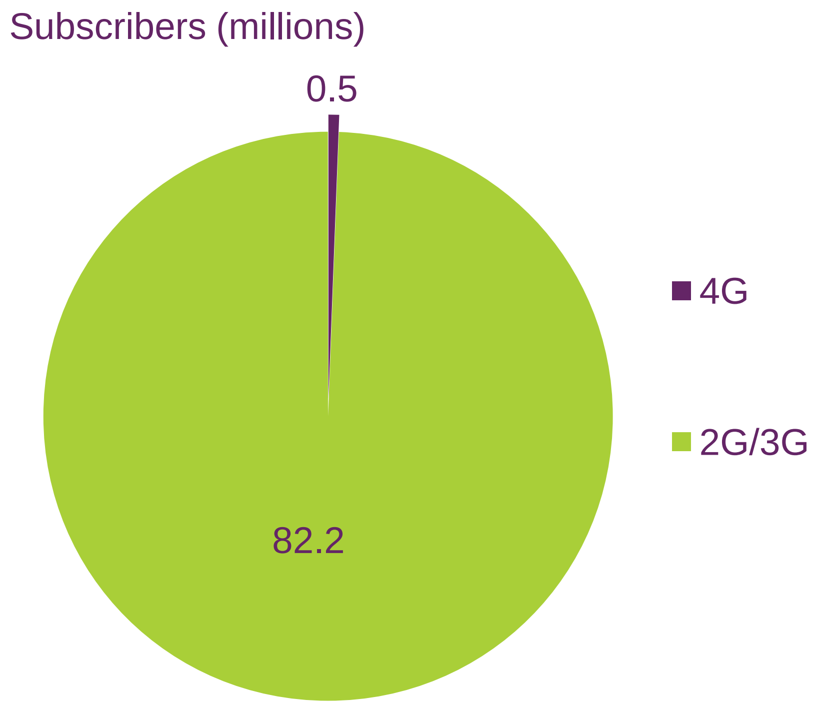
Source: Ofcom / operators

Notes: CDS = corporate data services

The launch of 4G paves the way for faster mobile services

Figure 5.2

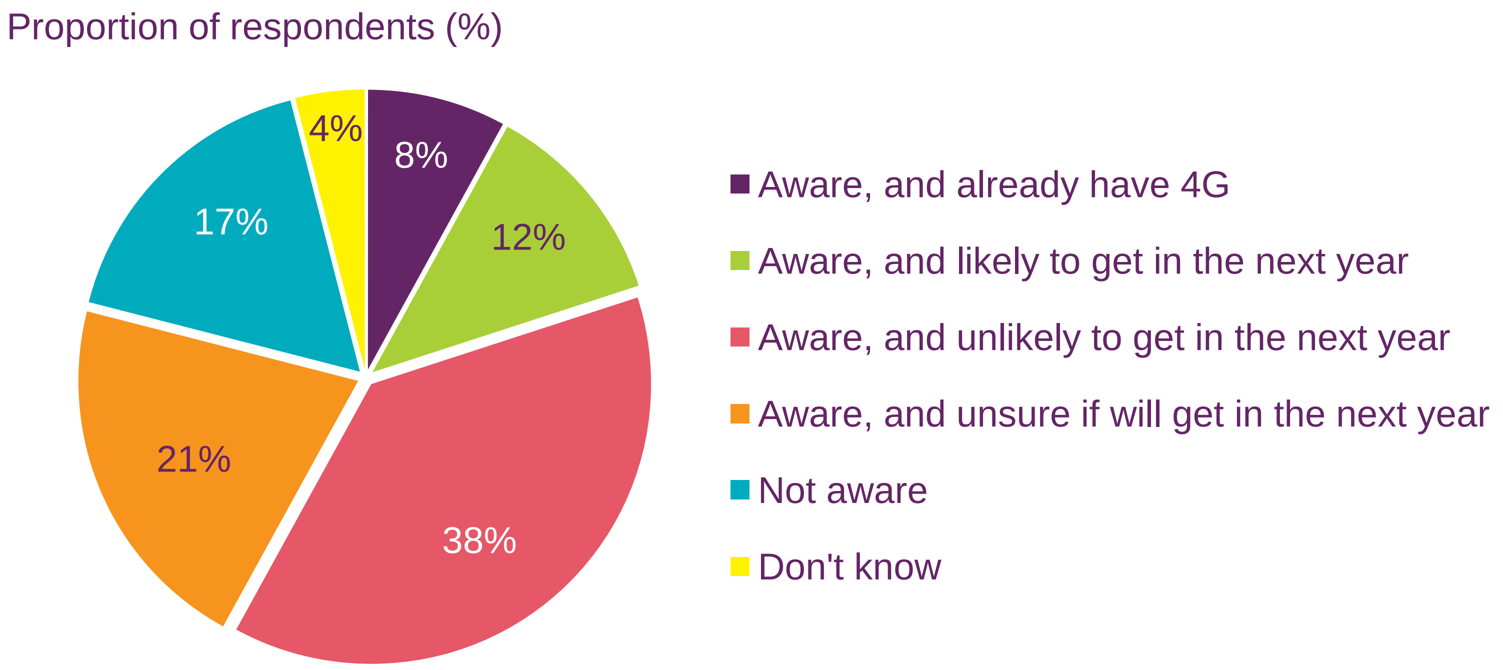
4G share of total mobile subscribers, May 2013



Source: EE for 4G subscriber figures; Ofcom/ operators for remaining mobile subscribers
Note: 4G subscribers are cited for the end of May 2013. Total mobile subscribers are cited for the end of December 2012. Because growth in the number of total mobile subscribers is low, the December 2012 figure is likely to provide an accurate estimate of the figure for the end of May 2013

Figure 5.3

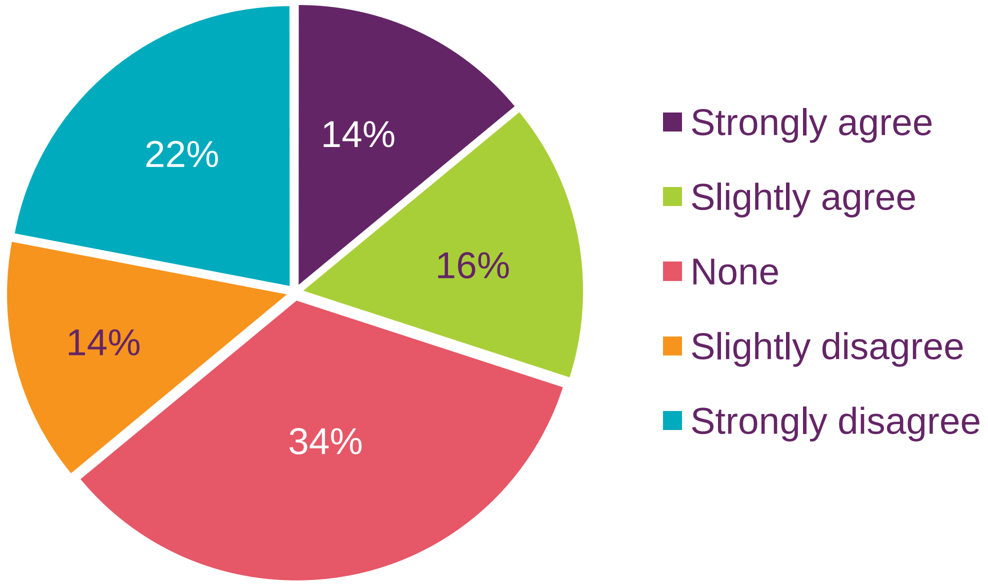
Awareness and take-up of 4G



Source: Ofcom research, April 2013
Base: All with mobile phone with internet (1320)
Question: 4G is a new service only currently available to Orange and T-Mobile (Everything Everywhere) customers, and it enables faster mobile internet access. Which of the following statements best describes your awareness and use of 4G?

Figure 5.4

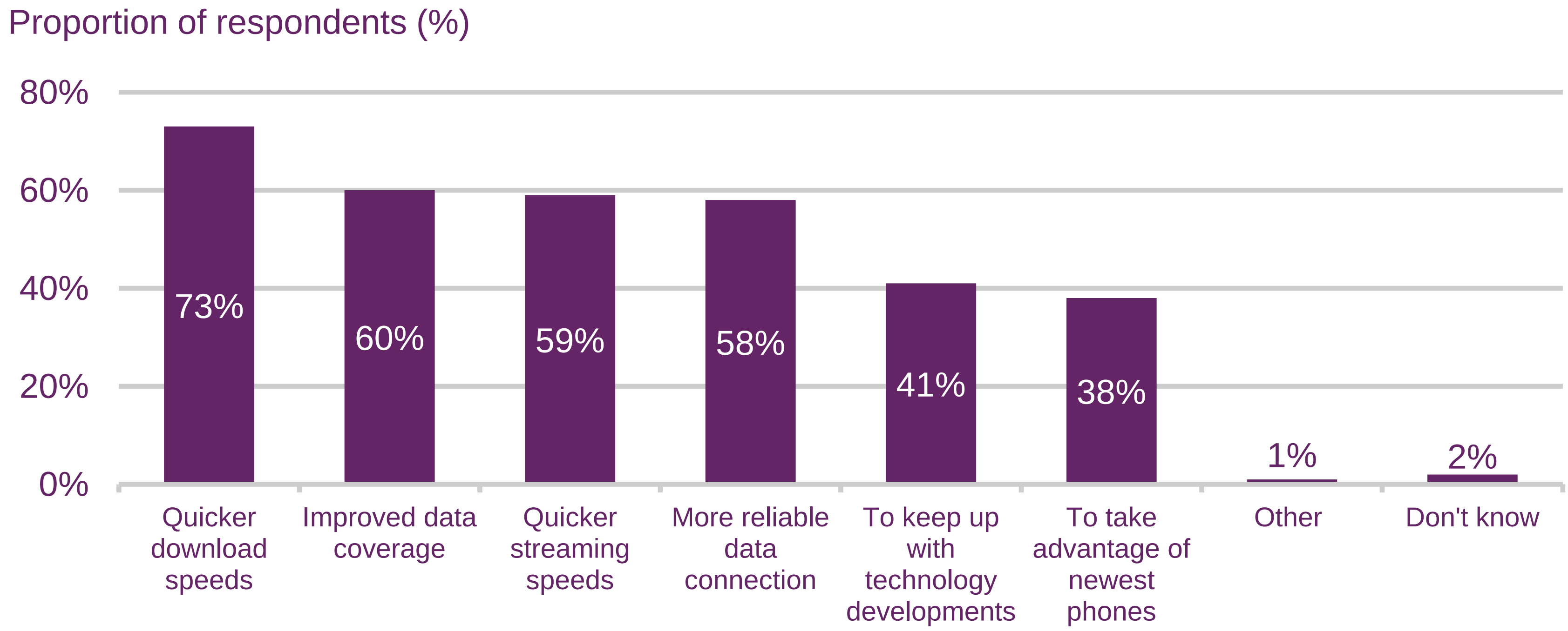
Future intention to sign up to 4G



Source: Ofcom research, April 2013
Base: All who use a smartphone (967)

Figure 5.5

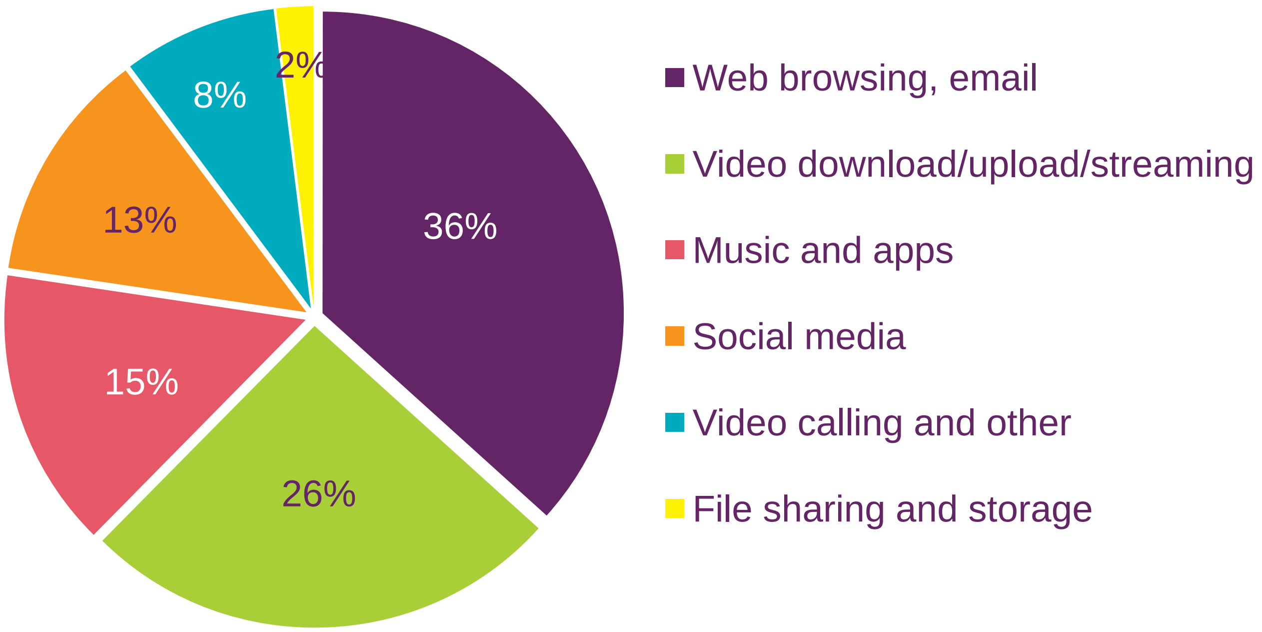
Reasons for wanting to upgrade to 4G



Source: YouGov Smartphone, Mobile Internet eXperience, December 2012.
Base: Respondents who own a smartphone and said they are likely to get a 4G handset on a 4G contract (681).
Question: You said that you are likely to get a 4G-enabled handset on a 4G data contract in the future. For which, if any, of the following reasons are you likely to get a 4G data contract? (Please select all that apply).

Figure 5.6

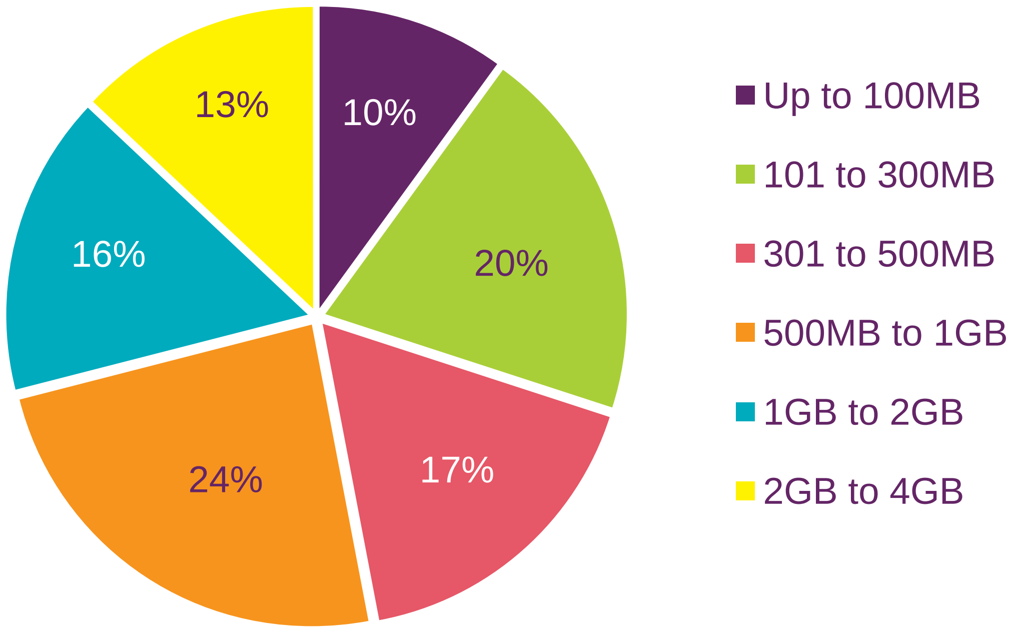
Use of EE's 4G network by application, March 2013



Source: EE

Figure 5.7

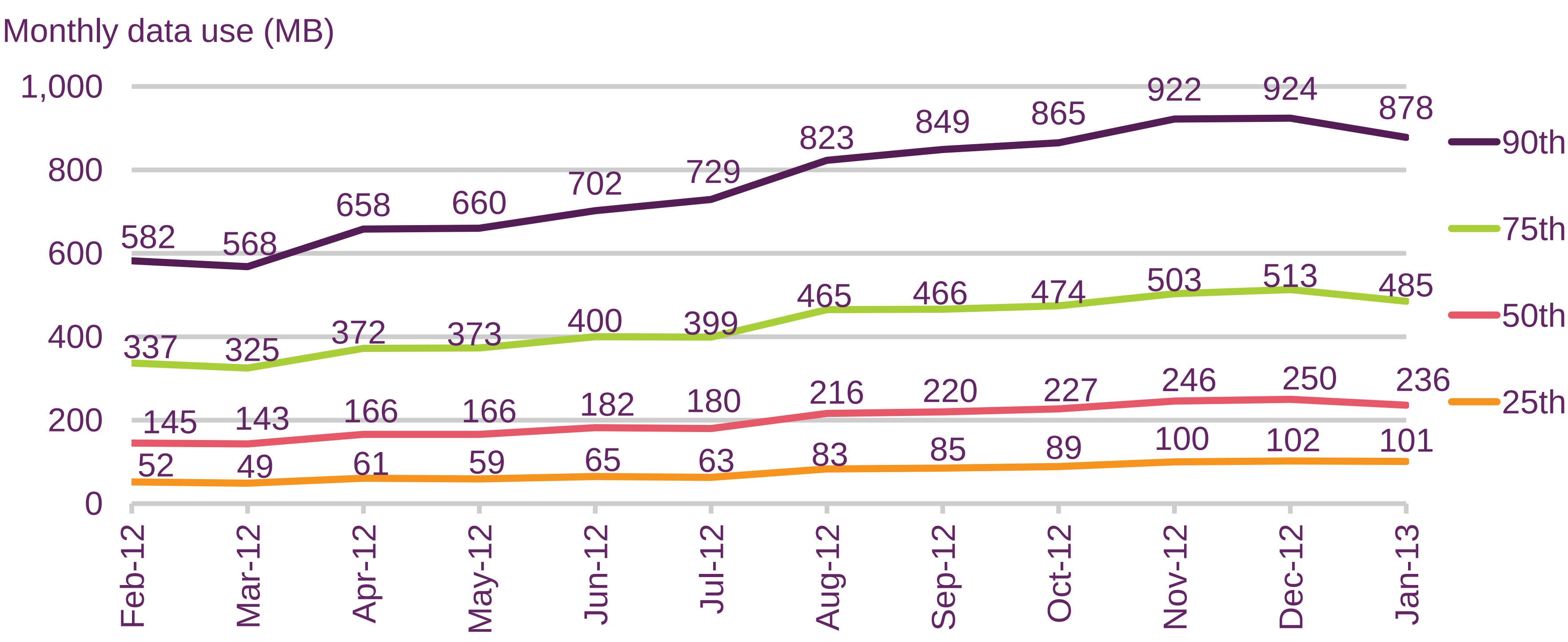
Volume of data consumption among 4G handset users



Source: YouGov, SixthSense & 4G Tariffs report
Question: How much data do you use in an average month? 'Don't knows' have been excluded.
Remaining base: 286, all of whom owned a 4G handset.

Figure 5.8

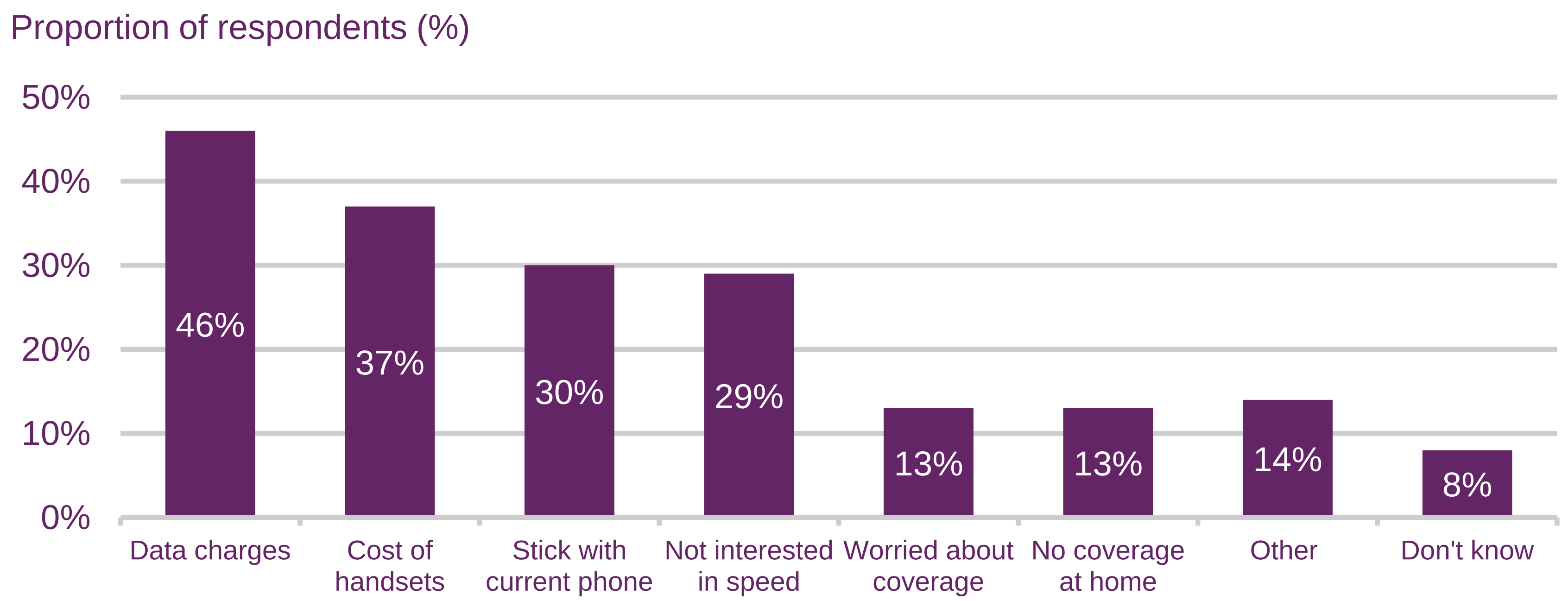
Volume of mobile data used by BillMonitor site visitors, by percentile



Source: BillMonitor.
Note: Percentiles given are counted from the lowest user. Therefore one-quarter of users consume less data than the 25th percentile.

Figure 5.9

Reasons for not moving to 4G

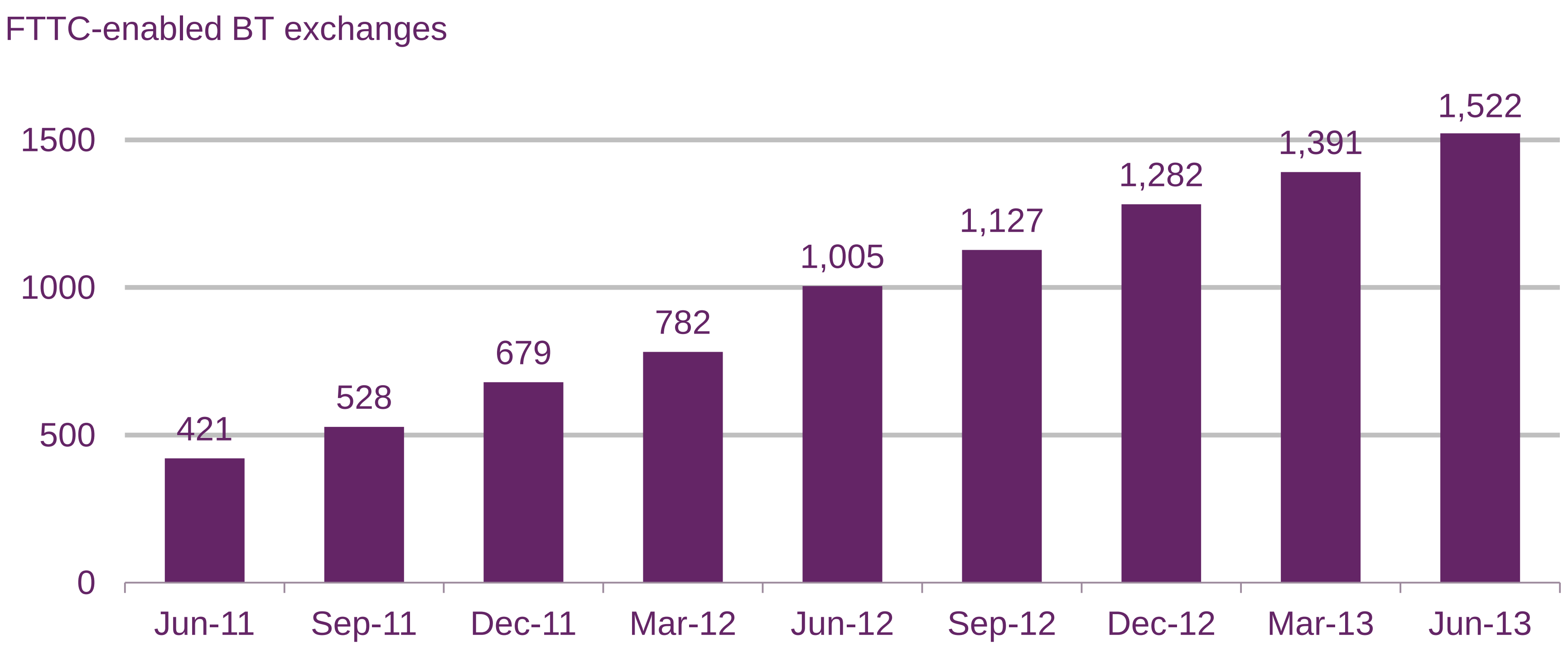


Source: YouGov SixthSense 4G Tariffs report.
Question: Which of these describes why you are unlikely to move to 4G? Please choose all that apply. Base: 225. The answers given in the chart are abbreviated for reasons of space and clarity. The full answers, in the same order given in the chart are: The greater use of data will make it too expensive; The handsets are too expensive; Not interested in faster speed; I really like my current phone, which is not 4G compatible; Worried about poor reception; Will not get reception where I live; Other; Don't know.

Superfast broadband becomes mass-market as availability increases

Figure 5.10

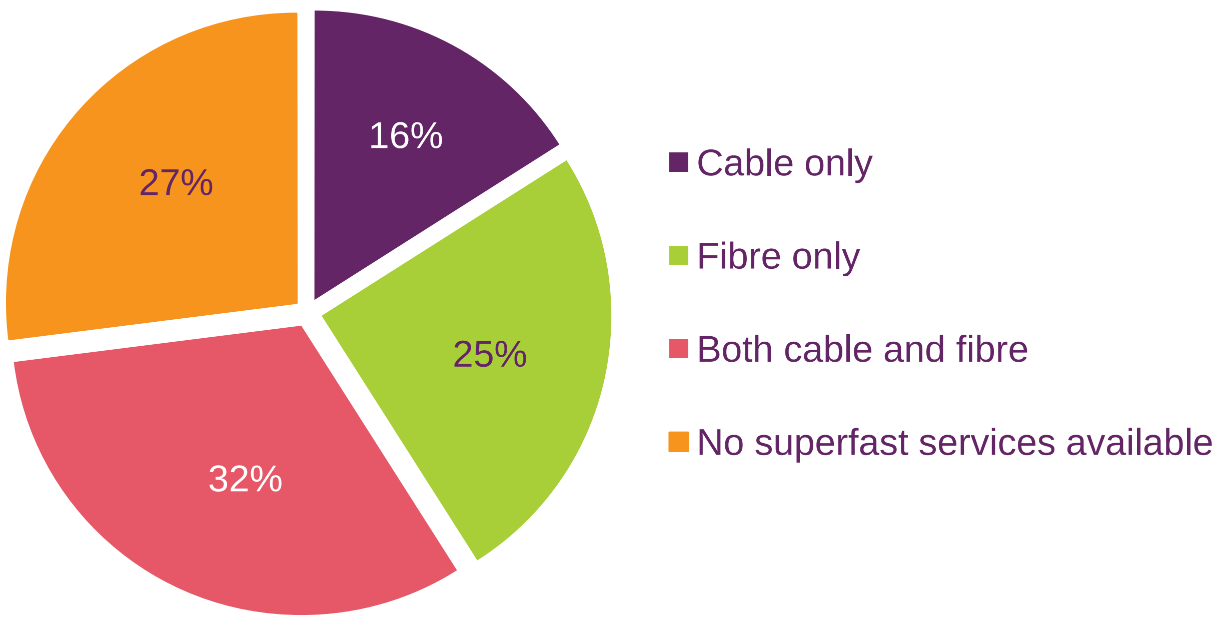
Number of BT exchanges that are fibre-to-the cabinet enabled



Source: BT Wholesale

Figure 5.11

Proportion of premises in postcodes served by NGA networks: by technology



Source: Ofcom / operator data, June 2013

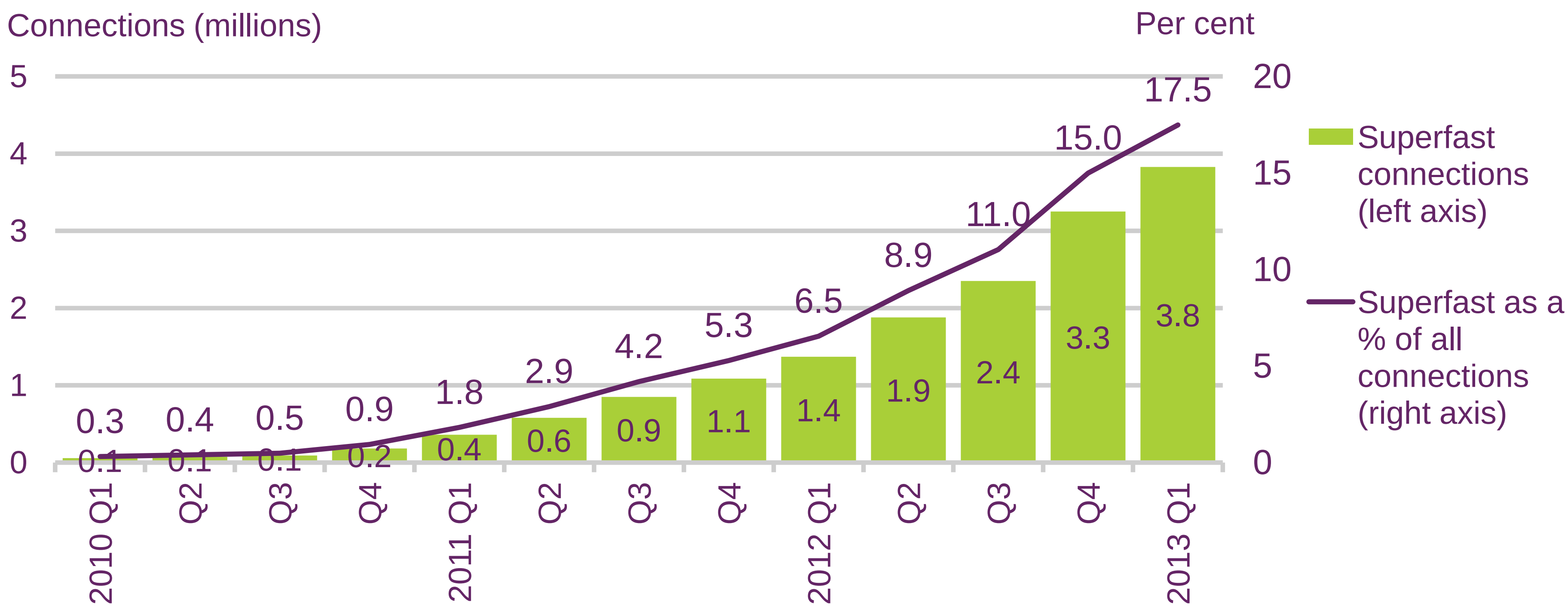
Figure 5.12

Comparison of major ISPs' superfast and current generation broadband services

		BT	Virgin Media	TalkTalk	Plusnet	Sky
Lowest cost superfast service	Headline download speed/technology	38Mbit/s FTTC	30Mbit/s cable	38Mbit/s FTTC	38Mbit/s FTTC	38Mbit/s FTTC
	Average actual speed, Nov 2012	34.2Mbit/s	28.7Mbit/s	-	-	-
	Data allowance	40GB plus unlimited WiFi	Unlimited	Unlimited	40GB plus unlimited off-peak	Unlimited
	Call allowance	Fixed off-peak	Virgin Media plus fixed weekend	Fixed off-peak	Fixed off-peak	Fixed weekends
	Monthly cost	£18 plus line rental	£14.50 plus line rental (or stand alone at £22.50)	£16.50 plus line rental	£15.99 plus line rental	£20 plus line rental
Lowest cost current generation service	Headline download speed/technology	16Mbit/s ADSL2+	n/a	16Mbit/s ADSL2+	16Mbit/s ADSL2+	A16Mbit/s DSL2+
	Average actual speed, Nov 2012	9.2Mbit/s	n/a	8.3Mbit/s	9.9Mbit/s	8.3Mbit/s
	Data allowance	10GB plus unlimited WiFi	n/a	Unlimited	10GB plus unlimited off-peak	Unlimited
	Call allowance	Fixed off-peak	n/a	Fixed off-peak	Fixed off-peak	Fixed weekends

Figure 5.13

Take-up of superfast broadband services

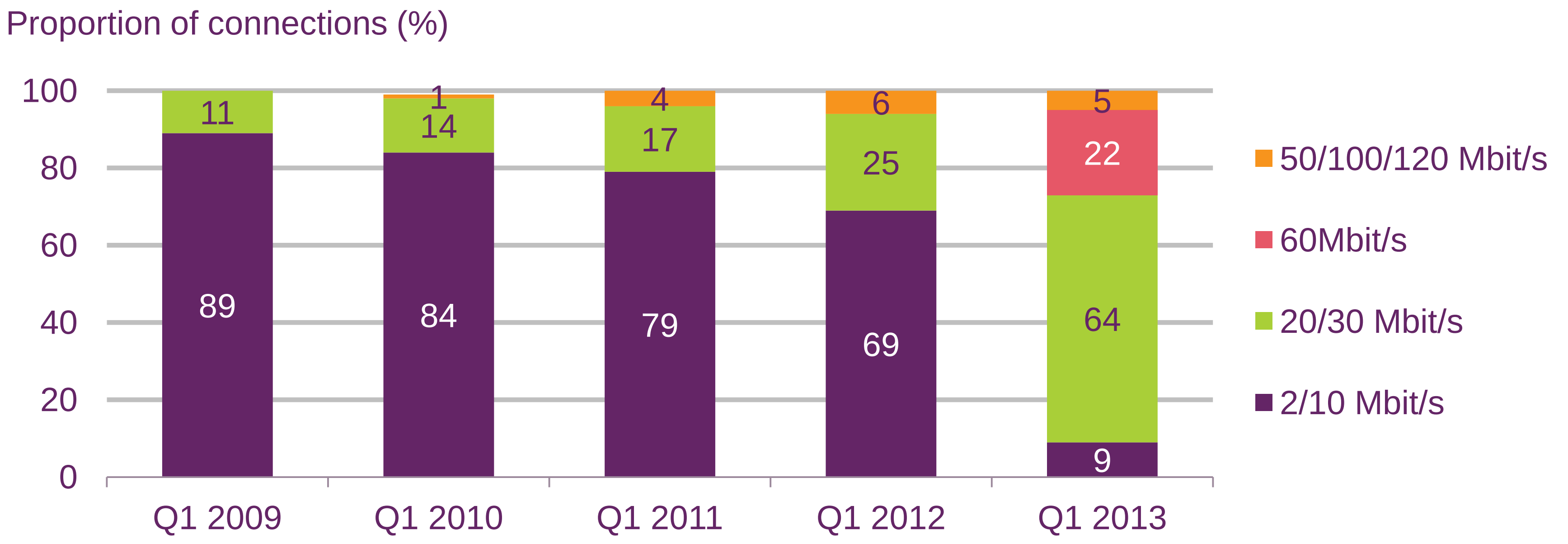


Source: Ofcom / operator data

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

Figure 5.14

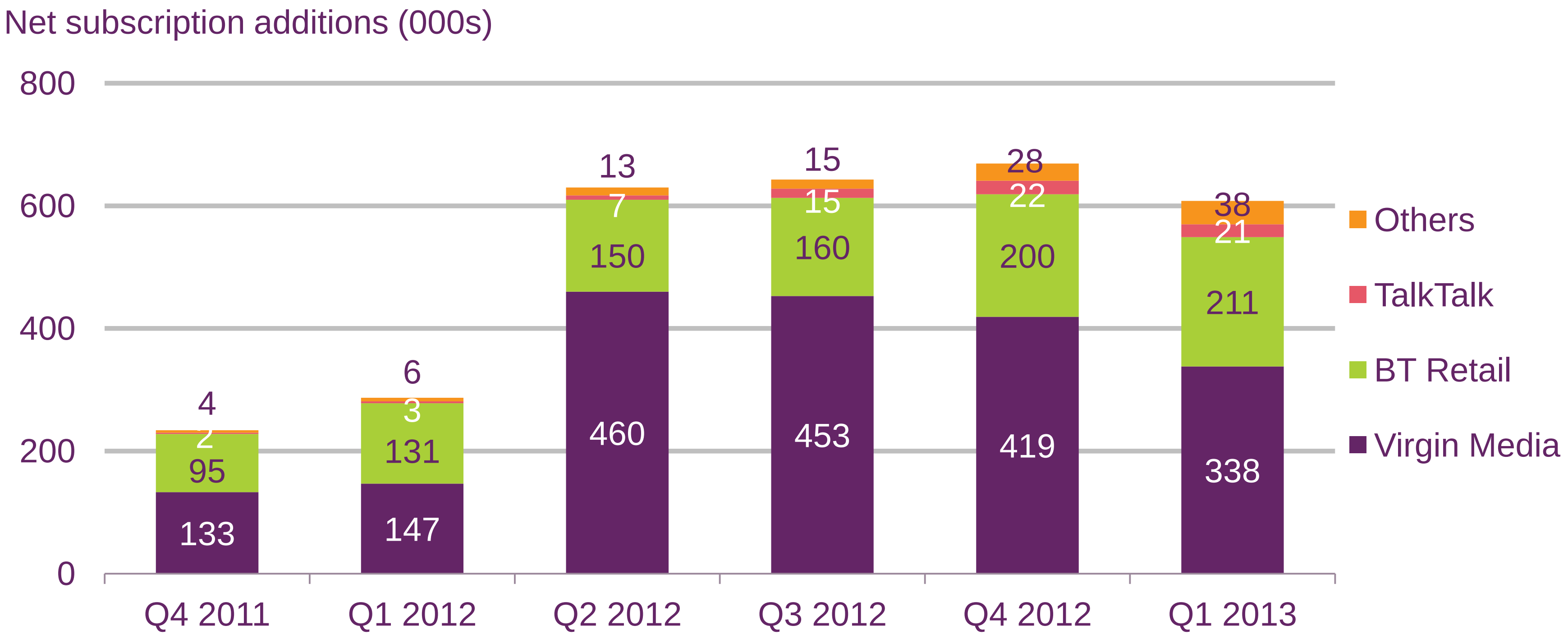
Changing composition of Virgin Media's broadband customer base



Source: Virgin Media: Q1 2013 Earnings Presentation

Figure 5.15

Superfast broadband net additions

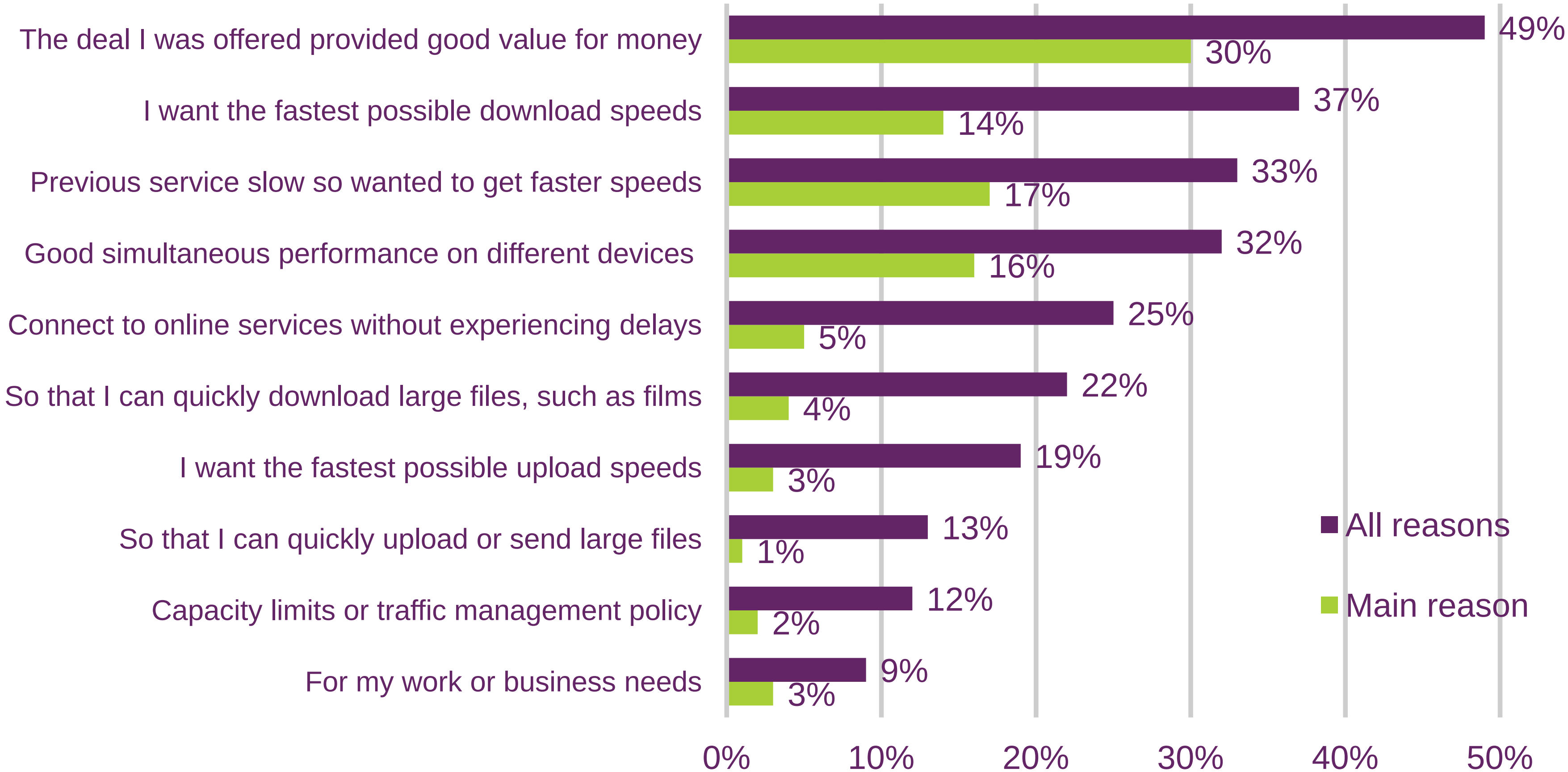


Source: Company Reports / Enders Analysis
Note: Data reflect company reported information, although estimates are used where data is incomplete or inconsistent.

Superfast users are altering their online behaviour after upgrading

Figure 5.16

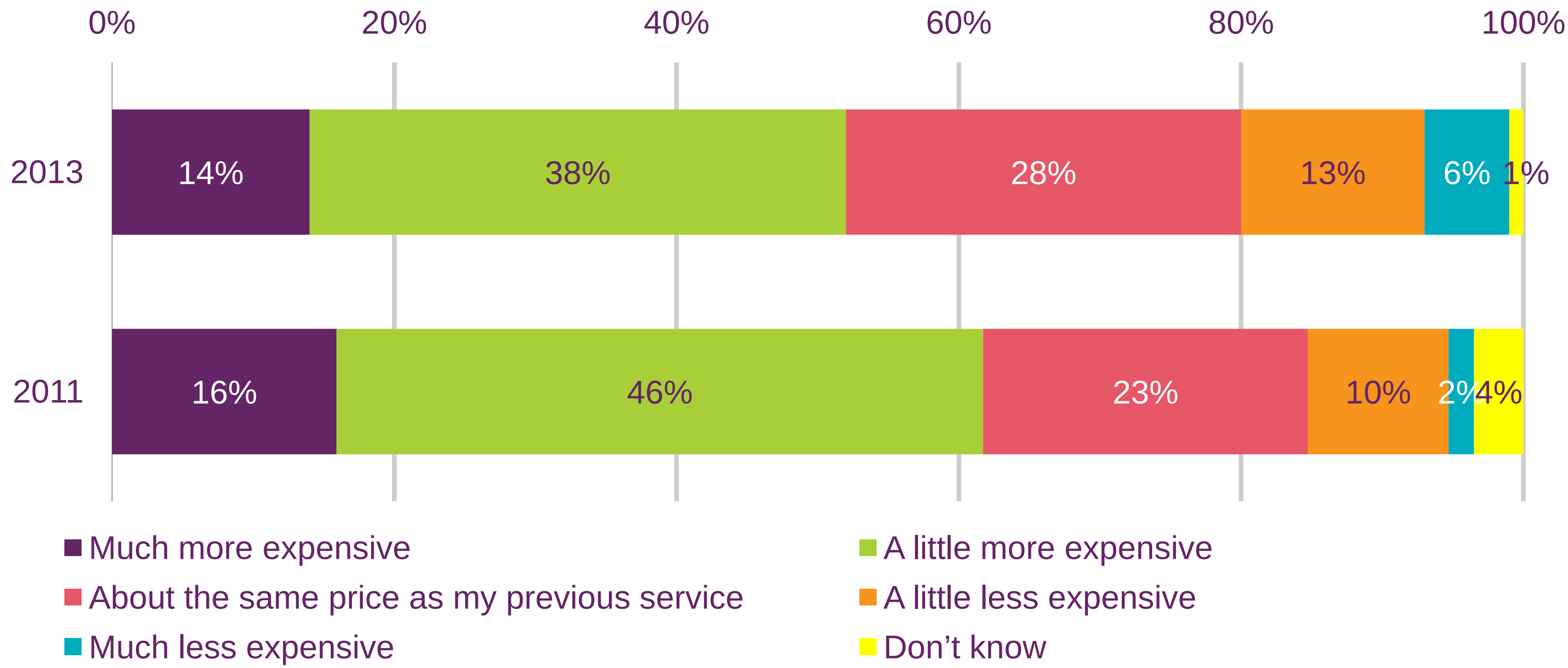
Reasons for choosing current broadband service



Source: Ofcom research, fieldwork carried out by Populus in March 2013
Base: All respondents (excluding those upgraded by their provider) (1016; Virgin Media 516, BT Infinity 272)
Question 1 & 2: Why did you choose a <x Mbit/s> broadband service? And which of these was the single most important reason?

Figure 5.17

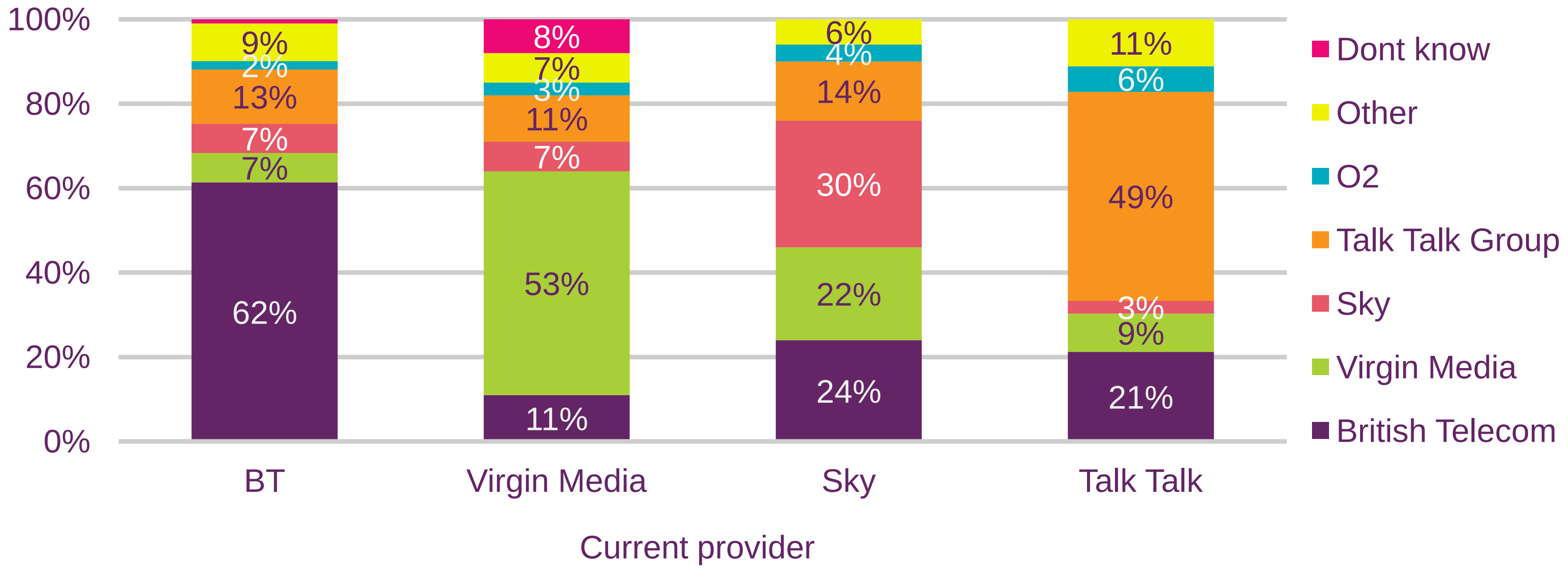
Price of current broadband service compared to previous service



Source: Ofcom research, fieldwork carried out by Populus in March 2013
Base: All respondents who had ADSL, cable or mobile broadband previously (994)
Question 9: How does the price of your current broadband service compare to the broadband service that you used to have?

Figure 5.18

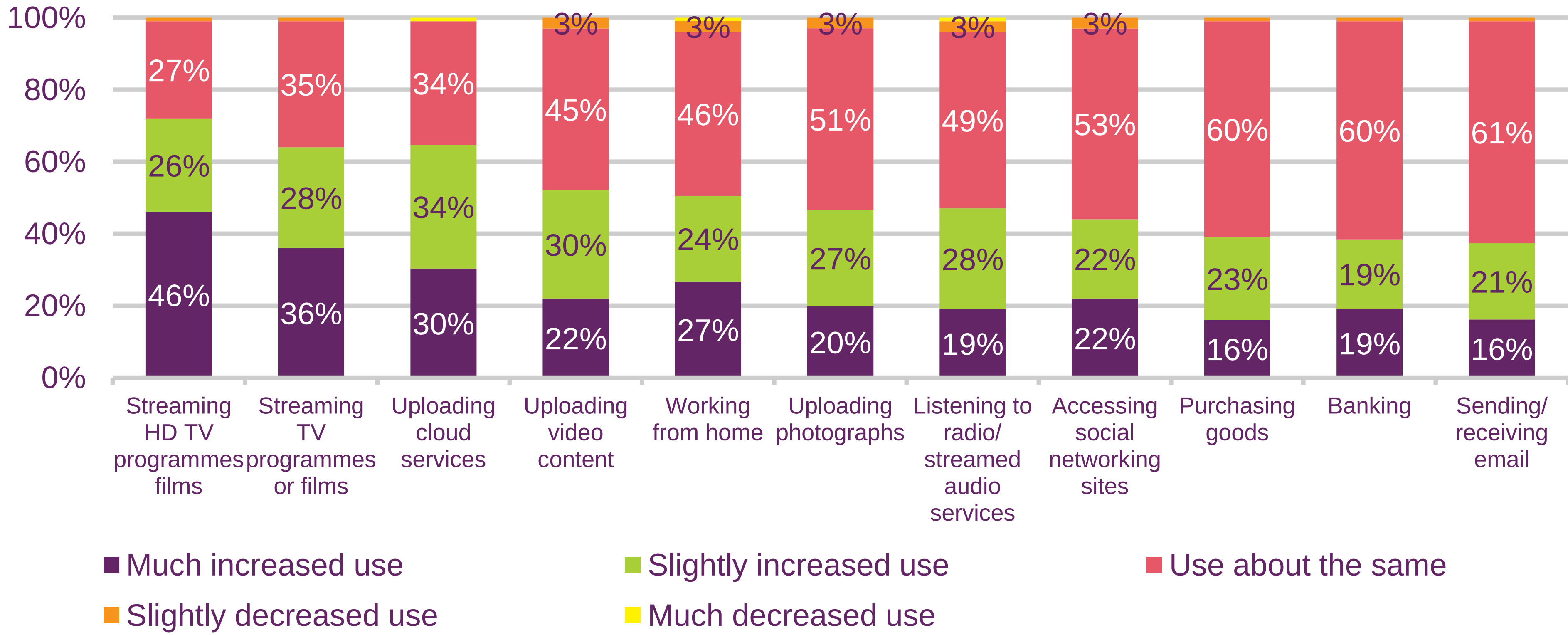
Previous internet service provider, by current superfast provider



Source: Ofcom research, fieldwork carried out by Populus in March 2013
Base: All with ADSL cable or mobile broadband previously: 1012; BT Infinity: 244; Virgin Media: 595, Sky 61, Talk Talk 76
Question 5: And which internet service provider did your household use before you subscribed to your (current) service?

Figure 5.19

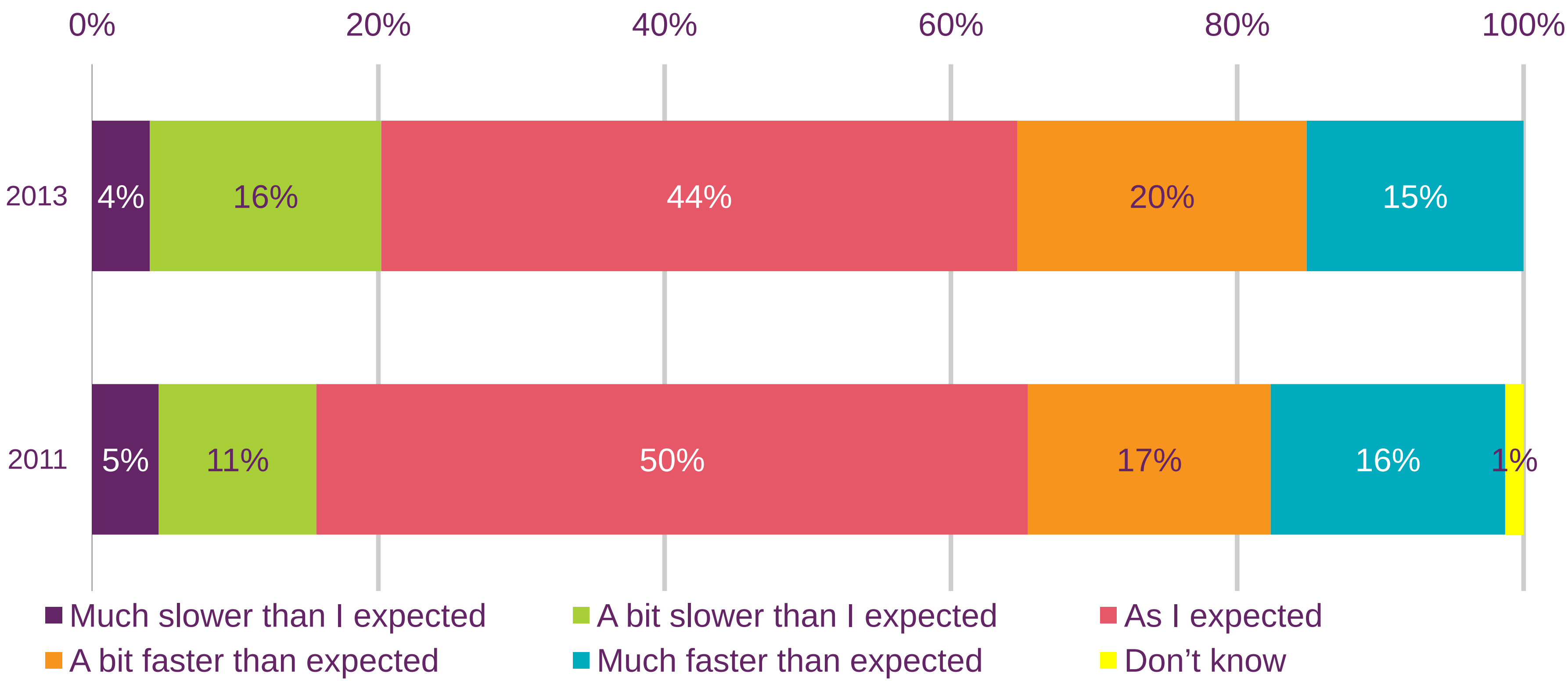
Change in use, compared to previous broadband connection



Source: Ofcom research, fieldwork carried out by Populus in March 2013
Base: All respondents who had ADSL, cable or mobile broadband previously and use each service
Question 12: How has the amount you use these services changed compared to when you had your previous

Figure 5.20

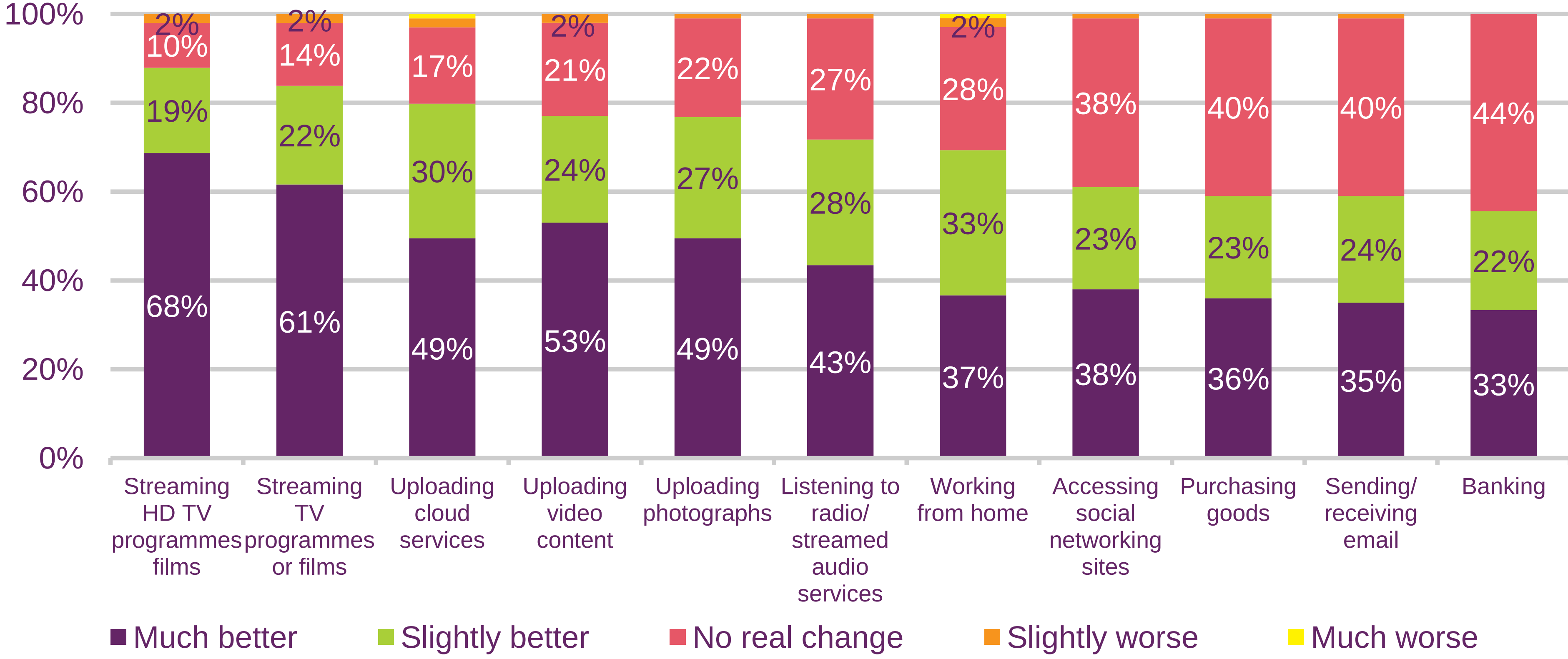
Speed of downloads compared to initial expectations, by year



Source: Ofcom research, fieldwork carried out by Populus in March 2013
Base: All with broadband before (943)
Quetsion 9: How does the download speed of your current broadband service compare with what you expected when you signed up for it?

Figure 5.21

Experience of using these services compared to previous broadband connection



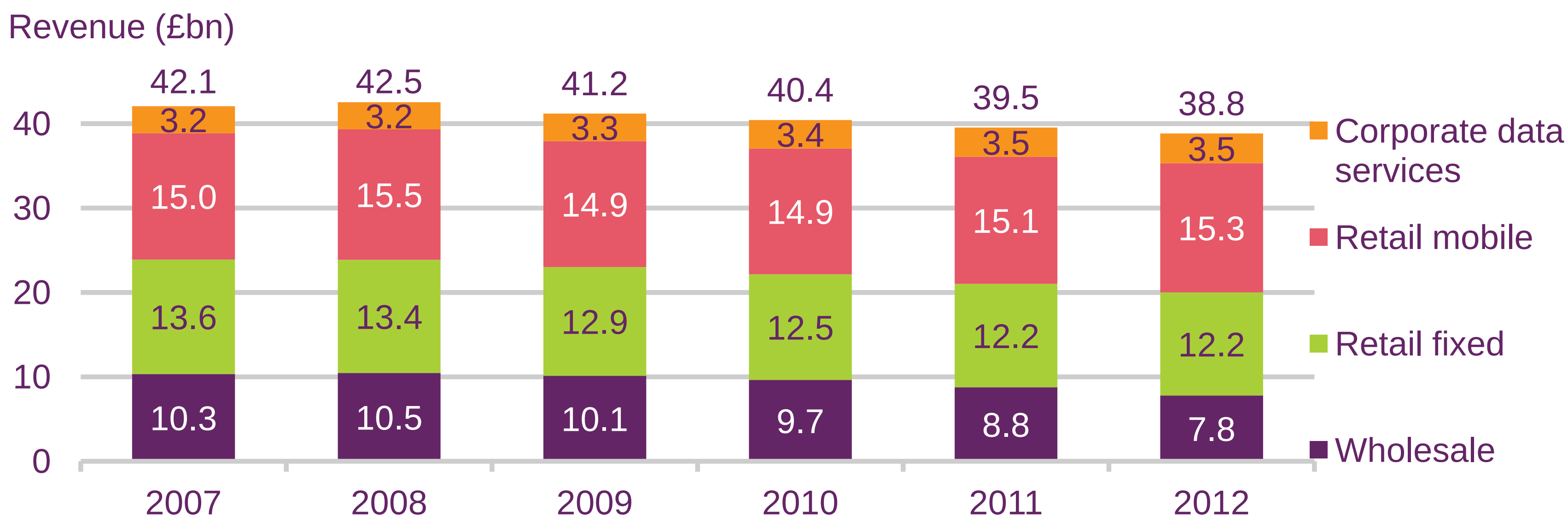
Source: Ofcom research, fieldwork carried out by Populus in March 2013
Base: All respondents who had ADSL, cable or mobile broadband previously and use each service
Question 13: How would you describe your experience of these services using your current connection compared to your previous connection?

The telecoms industry

Market overview

Figure 5.22

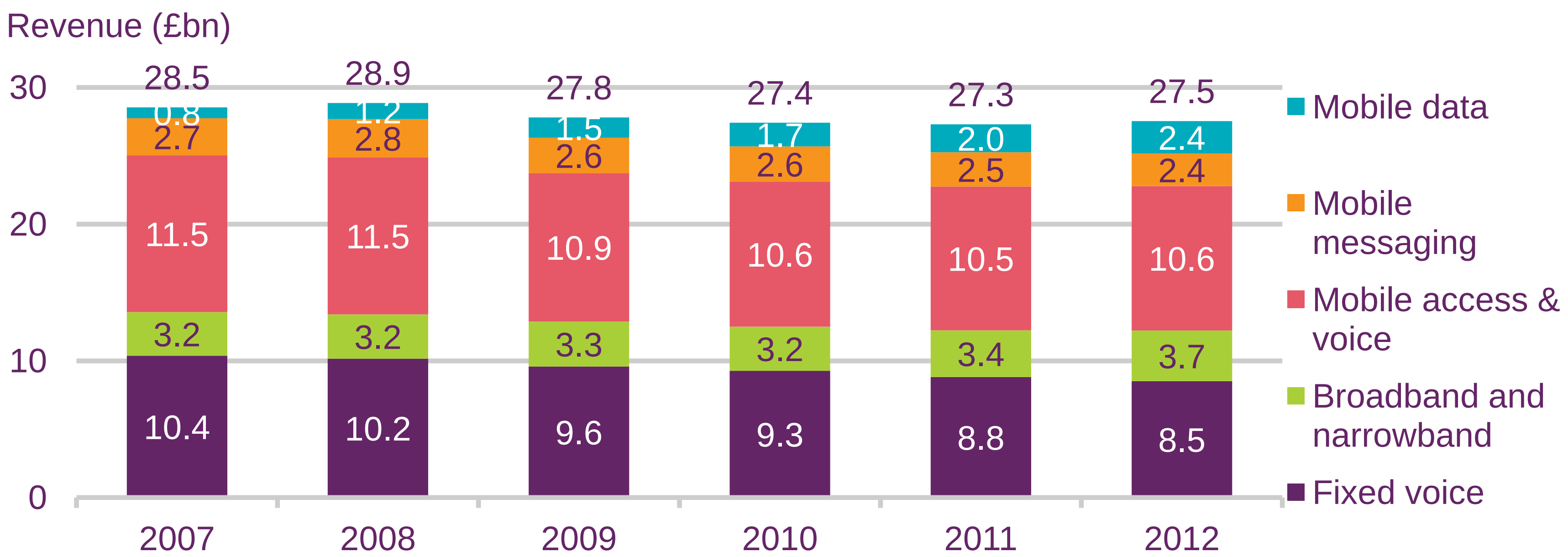
Total telecoms revenue, by wholesale and retail, fixed and mobile, and corporate data services



Source: Ofcom / operators with the exception of corporate data services, which is sourced from IDC.
Notes: Corporate data services comprises web hosting, ethernet, IP VPN, digital leased line and frame relay/ATM services; wholesale mobile comprises mobile voice and SMS termination revenue and wholesale inbound roaming revenue (i.e. - revenue from overseas operators when their subscribers use UK networks).

Figure 5.23

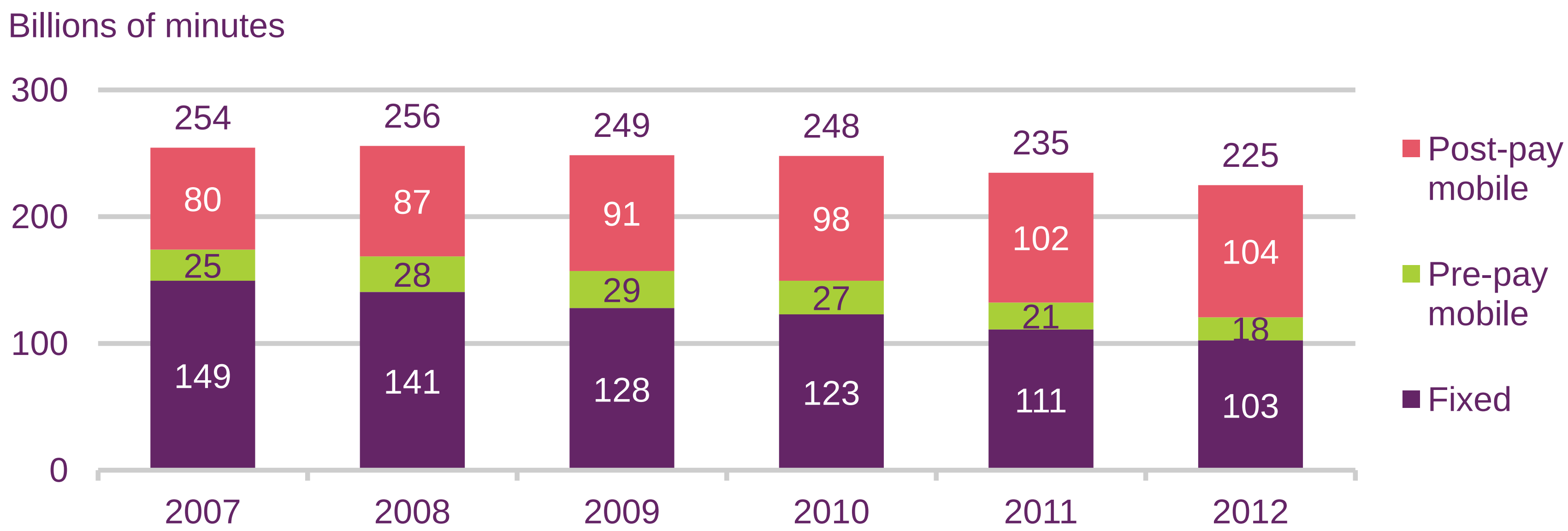
Retail revenue, by service



Source: Ofcom / operators

Figure 5.24

Volume of outgoing fixed and mobile voice minutes



Source: Ofcom / operators

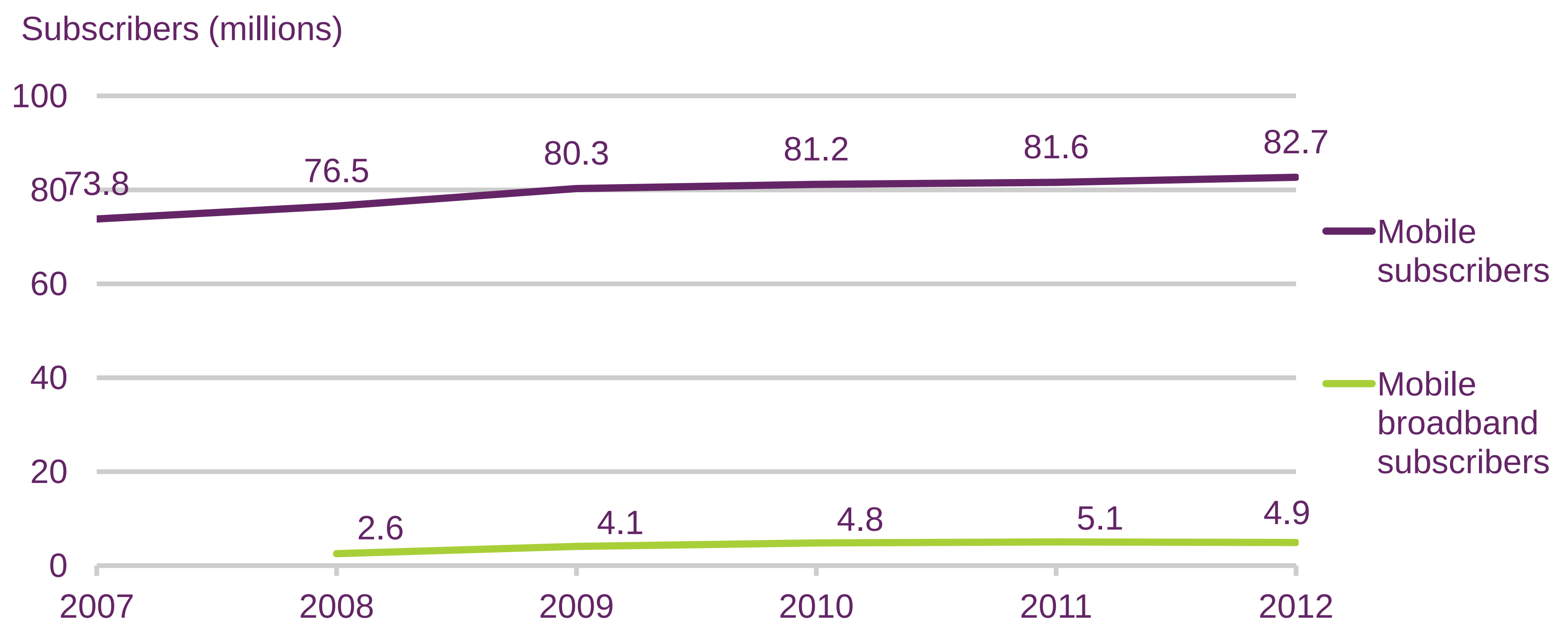
Figure 5.25

Number of fixed connections, by service

Source: Ofcom / operators

Figure 5.26

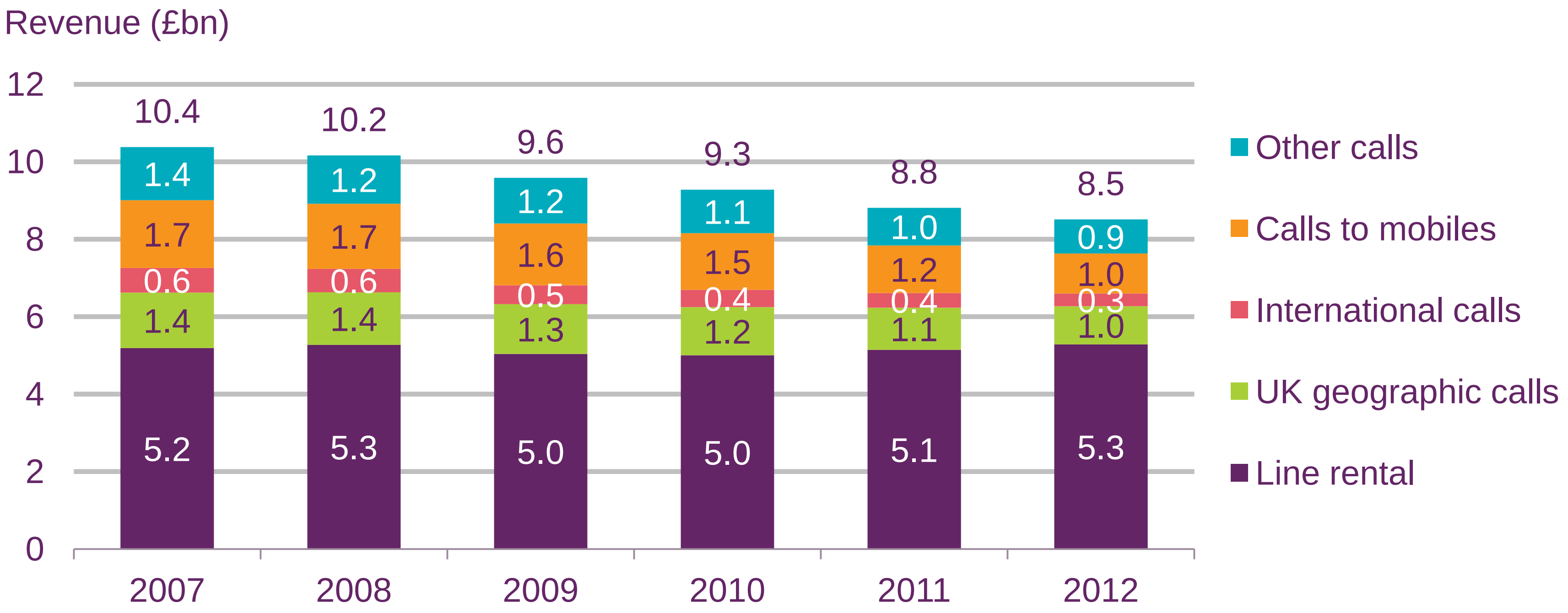
Number of mobile and mobile broadband subscribers



Source: Ofcom / operators.
Note: Mobile broadband subscriber figures are included in the total mobile subscriber figures.

Figure 5.27

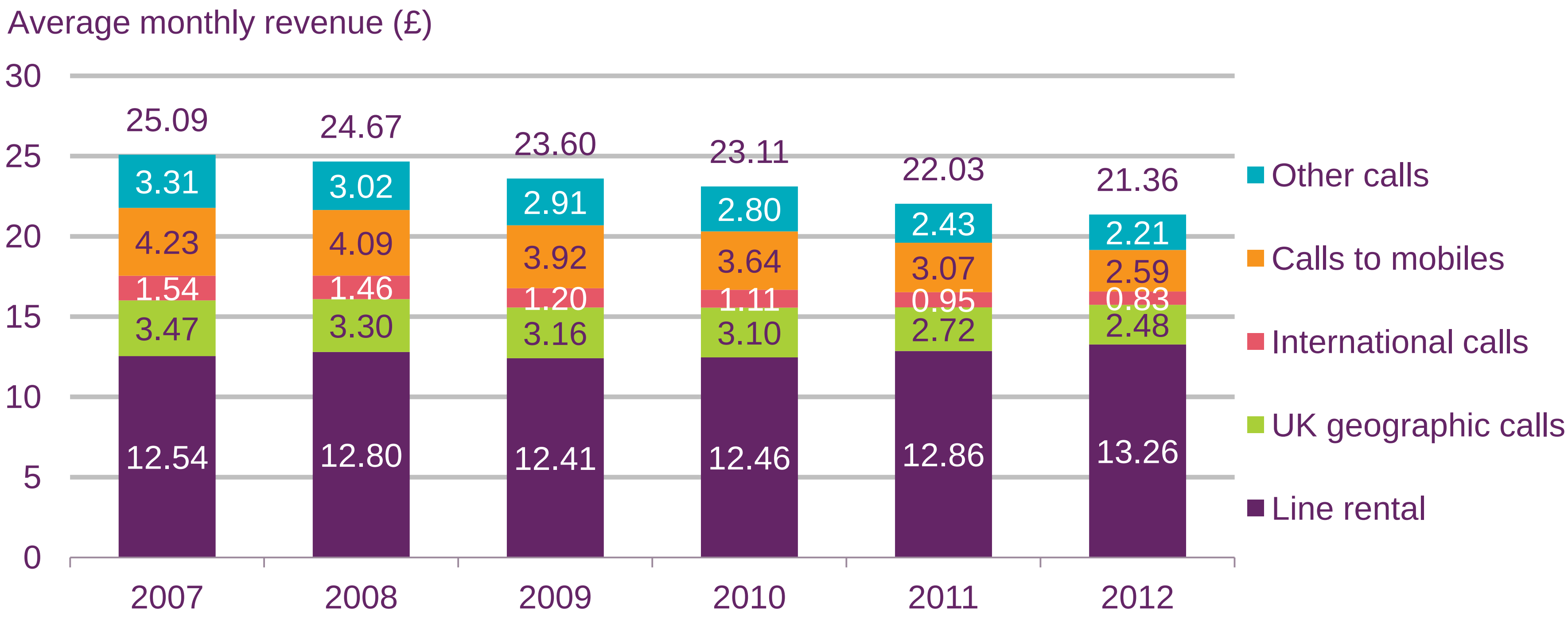
Retail fixed voice revenues: 2007 to 2012



Source: Ofcom/operators

Figure 5.28

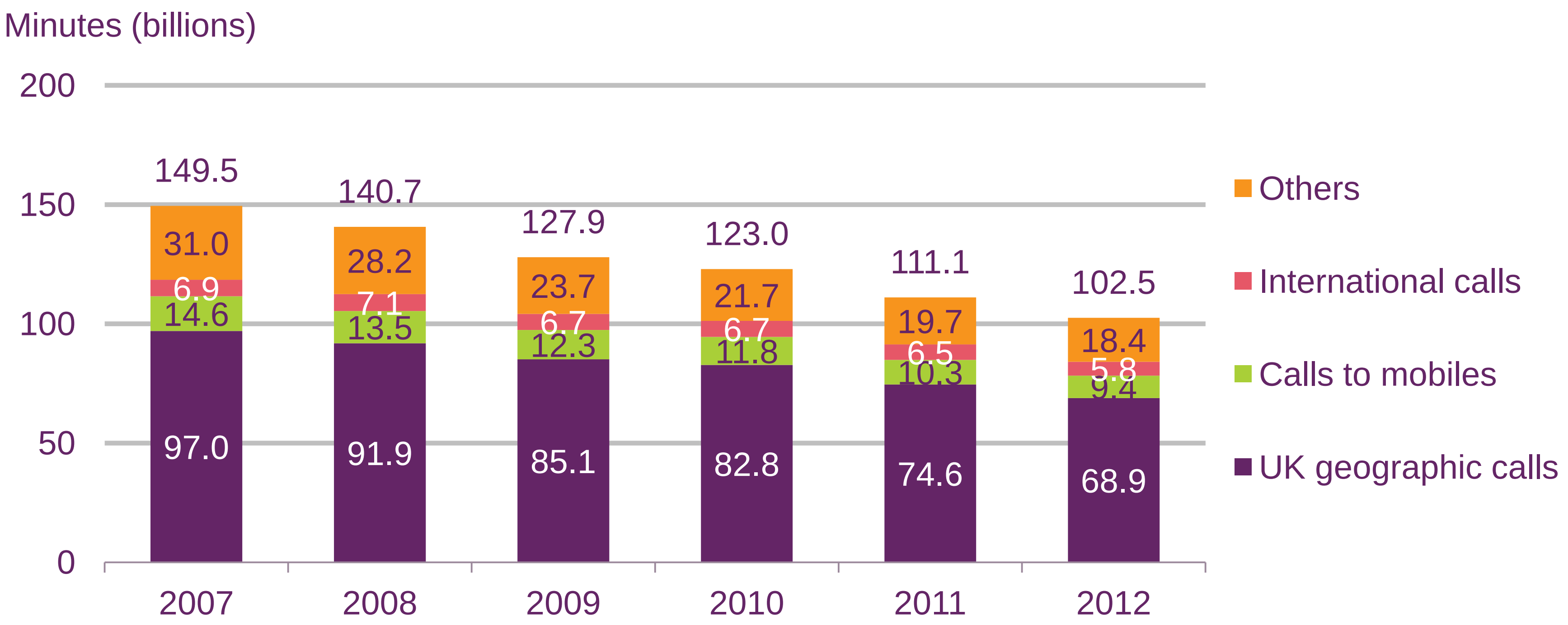
Average monthly retail revenue per fixed line



Source: Ofcom/operators

Figure 5.29

Fixed voice volumes, by type of call



Source: Ofcom/operators
Note: Others category includes narrowband internet calls.

Figure 5.30

Share of fixed voice call volumes

Source: Ofcom/operators

Figure 5.31

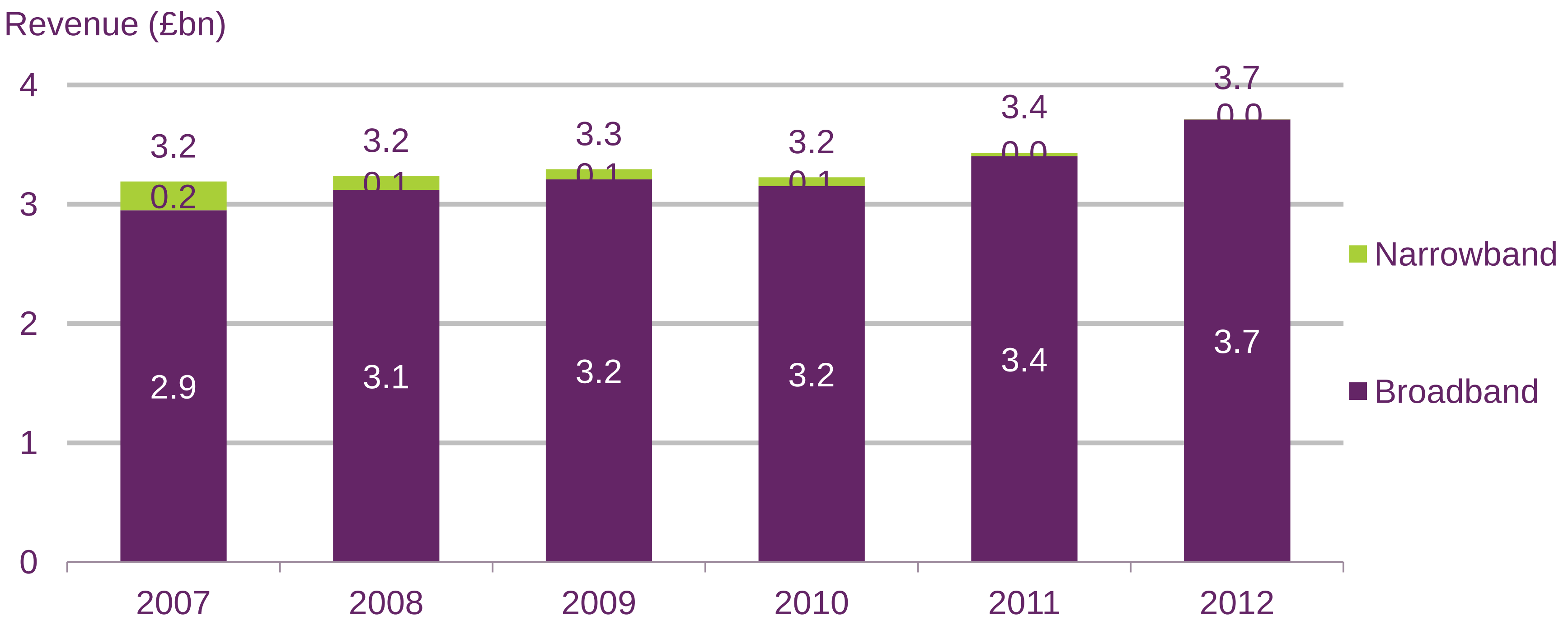
Number of fixed lines: 2007 to 2012

Source: Ofcom/operators

Fixed data services

Figure 5.32

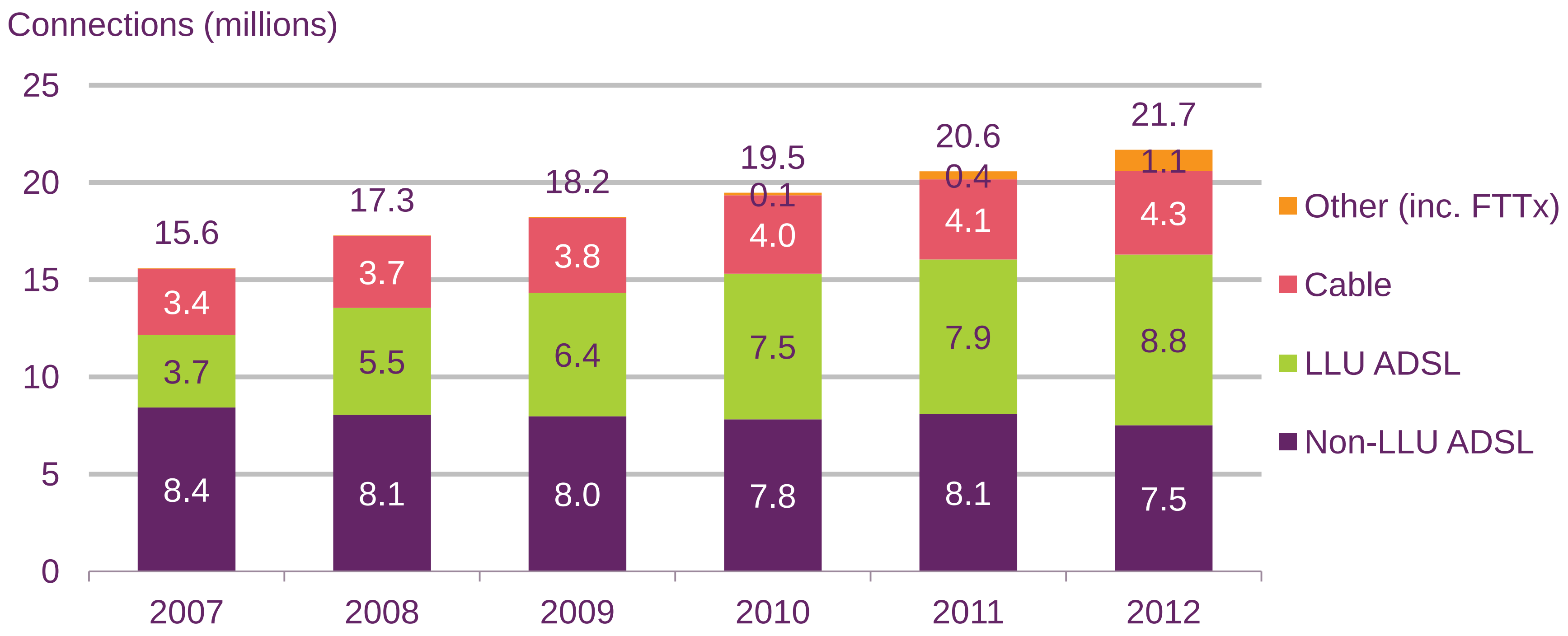
Retail fixed internet revenues



Source: Ofcom/operators

Figure 5.33

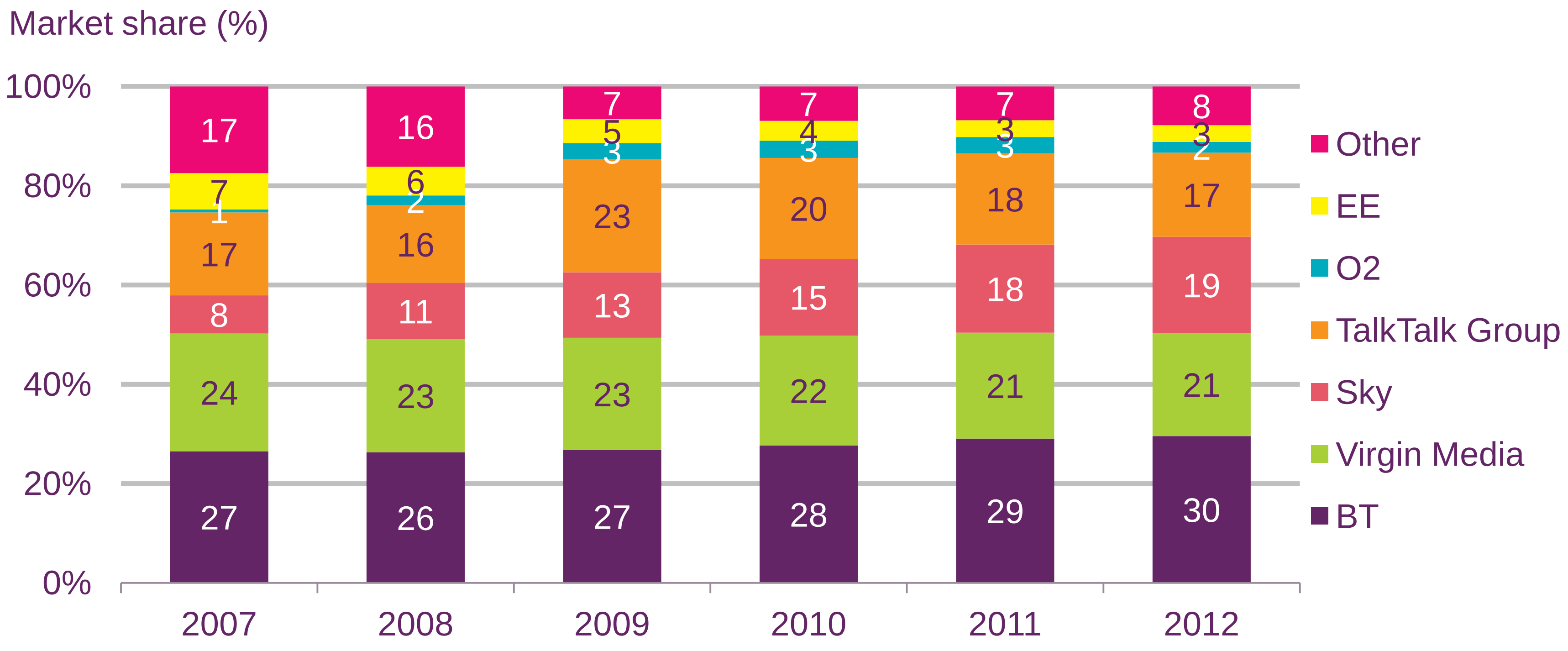
Fixed broadband connections: 2007 to 2012



Source: Ofcom/operators

Figure 5.34

Fixed broadband market share: 2007 to 2012



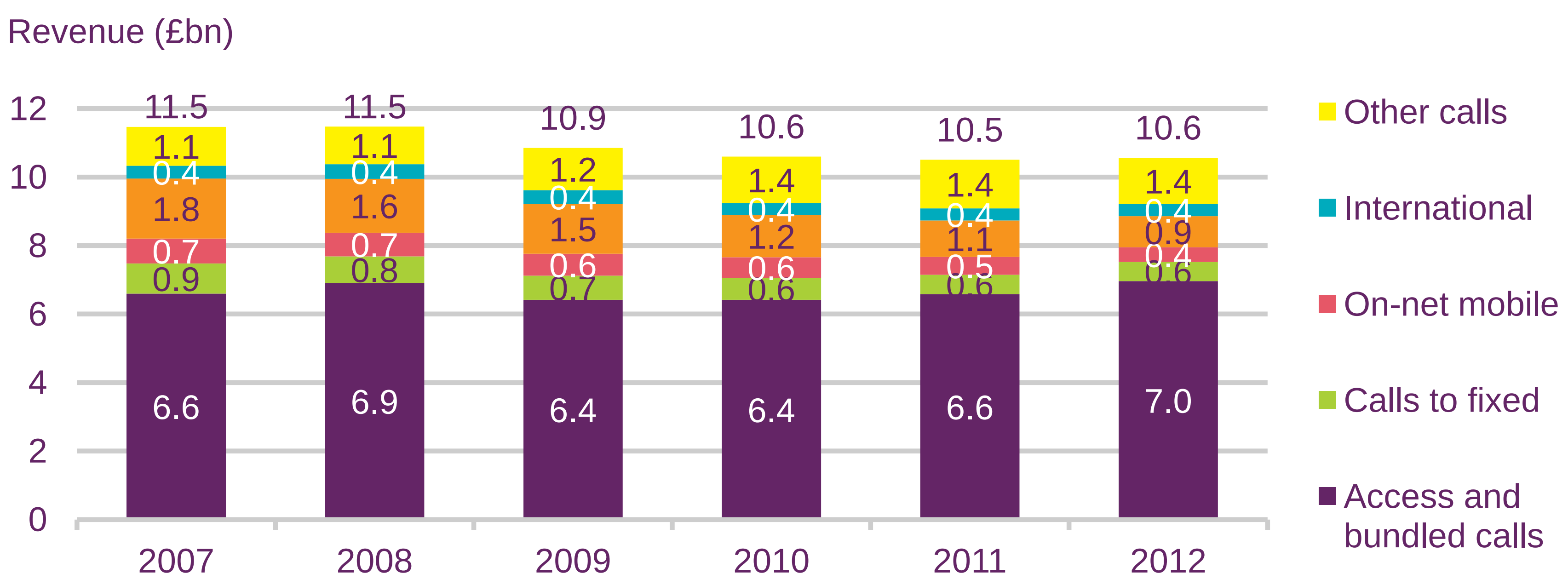
Source: Ofcom/operators

Note: TalkTalk figures include Tiscali from 2009 onwards. Please also note that Tiscali was included in 'Other' prior to 2009.

Mobile voice and data services

Figure 5.35

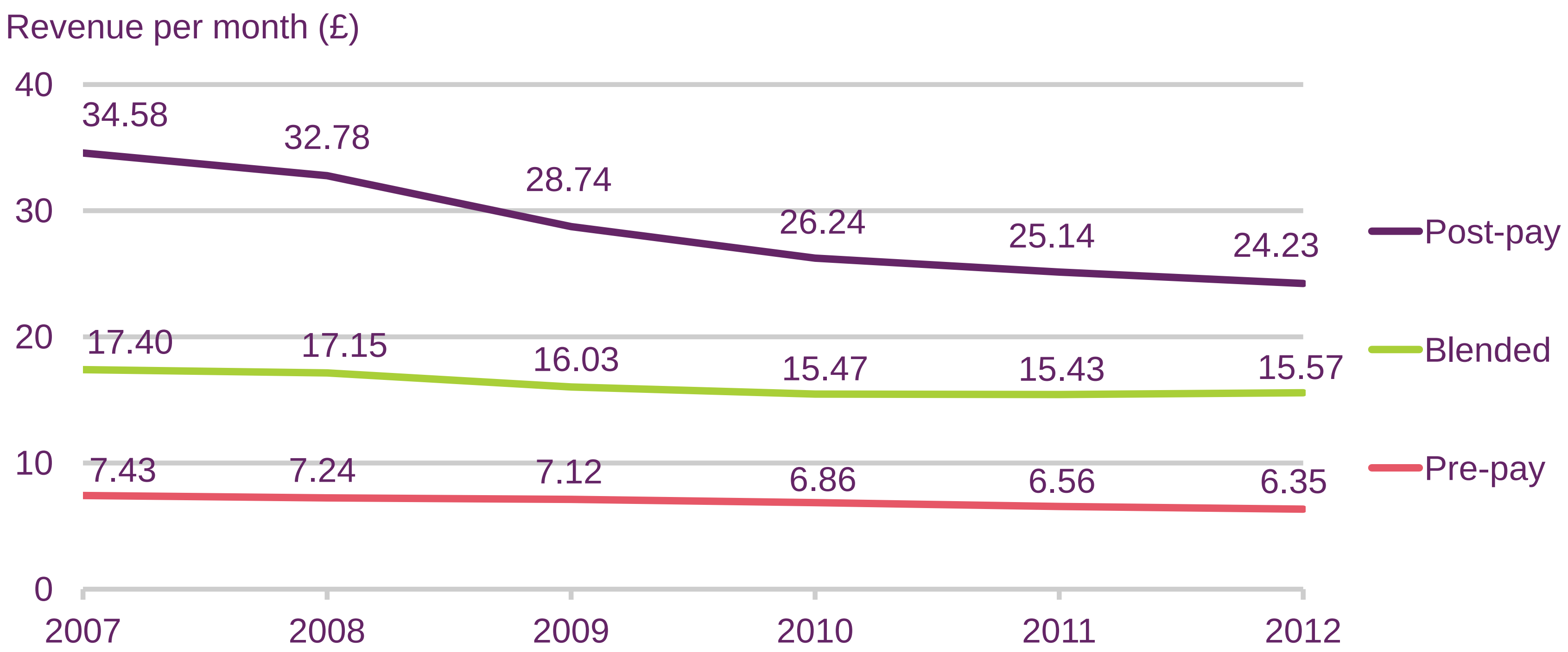
Mobile voice retail revenue, by type of call



Source: Ofcom / operators

Figure 5.36

Average revenue per user for mobile subscribers



Source: Ofcom / operators.
Note: Blended refers to all subscribers: pre-pay and post-pay.

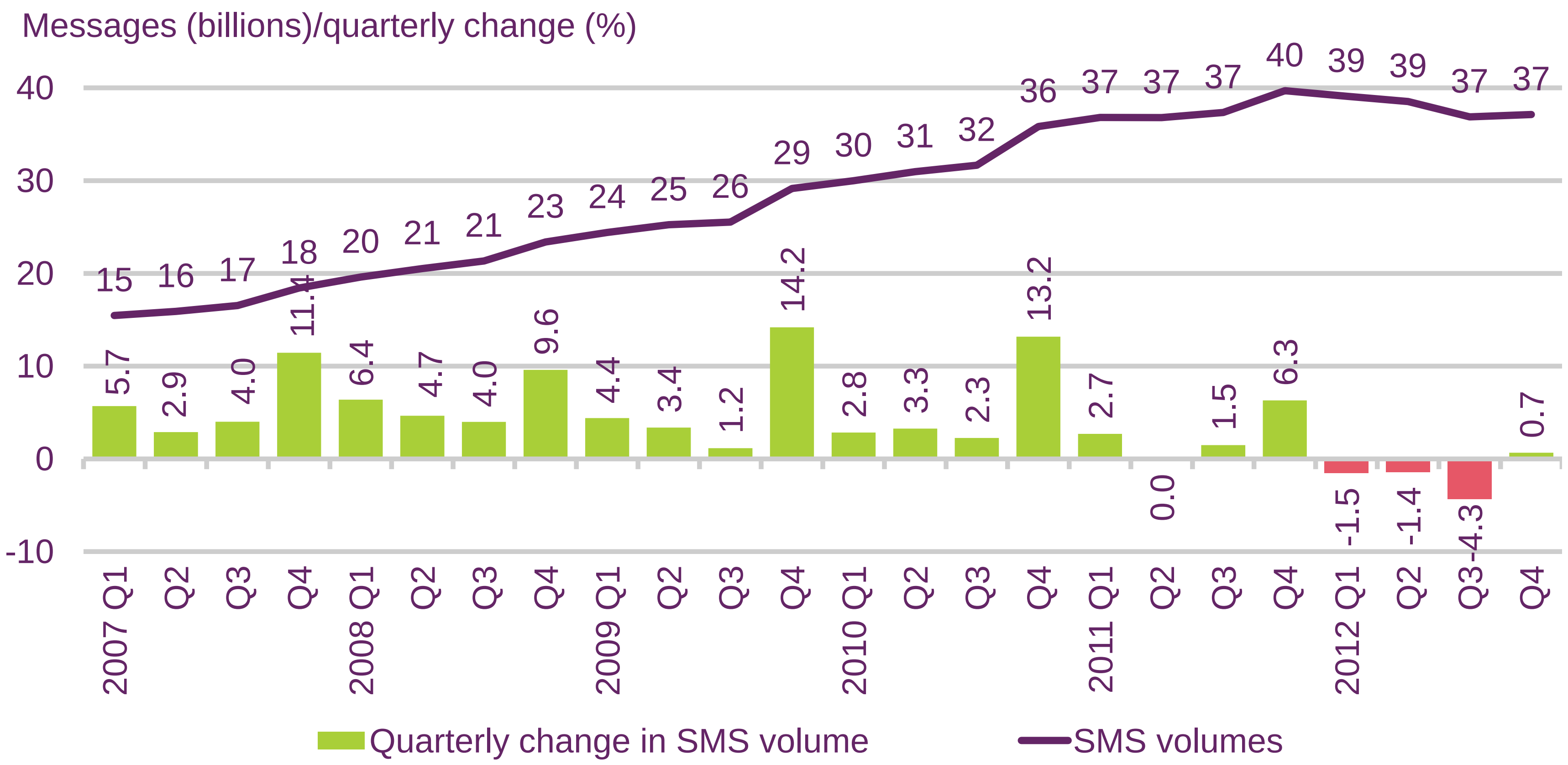
Figure 5.37

Volume of outgoing mobile minutes, by type of call

Source: Ofcom / operators

Figure 5.38

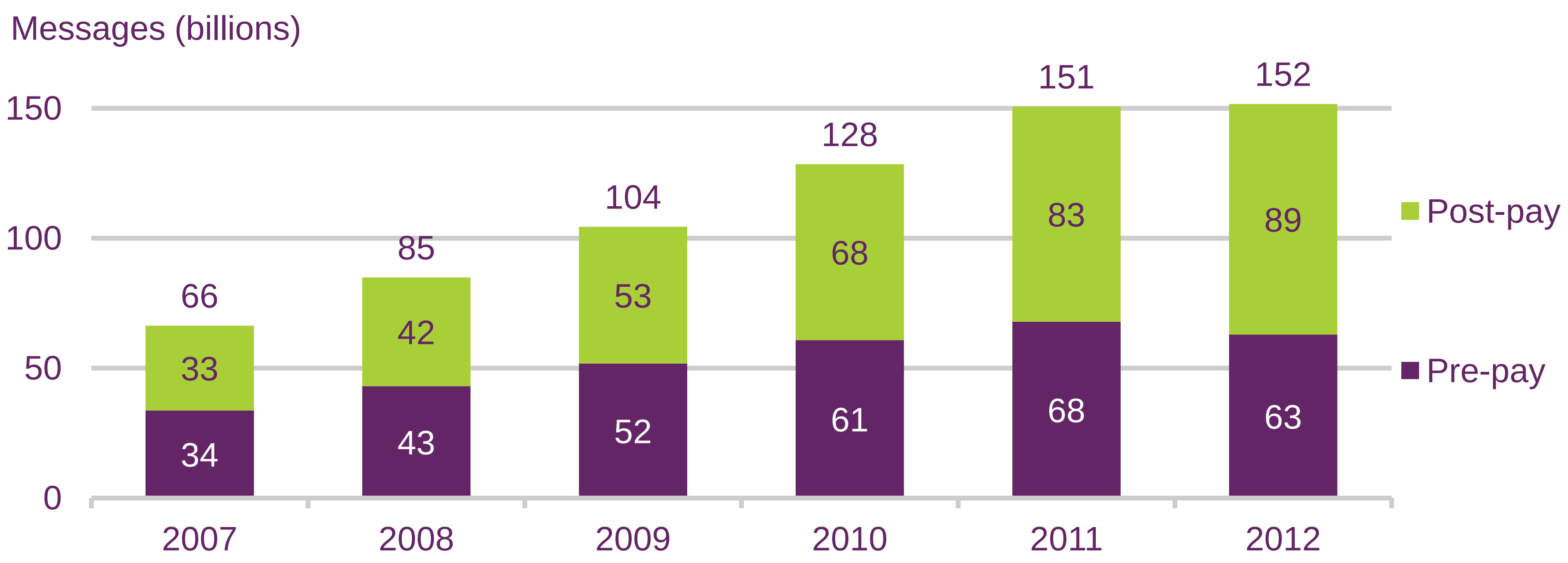
Volume of SMS messages sent, and quarter-on-quarter change: Q1 2007 to Q4 2012



Source: Ofcom / operators

Figure 5.39

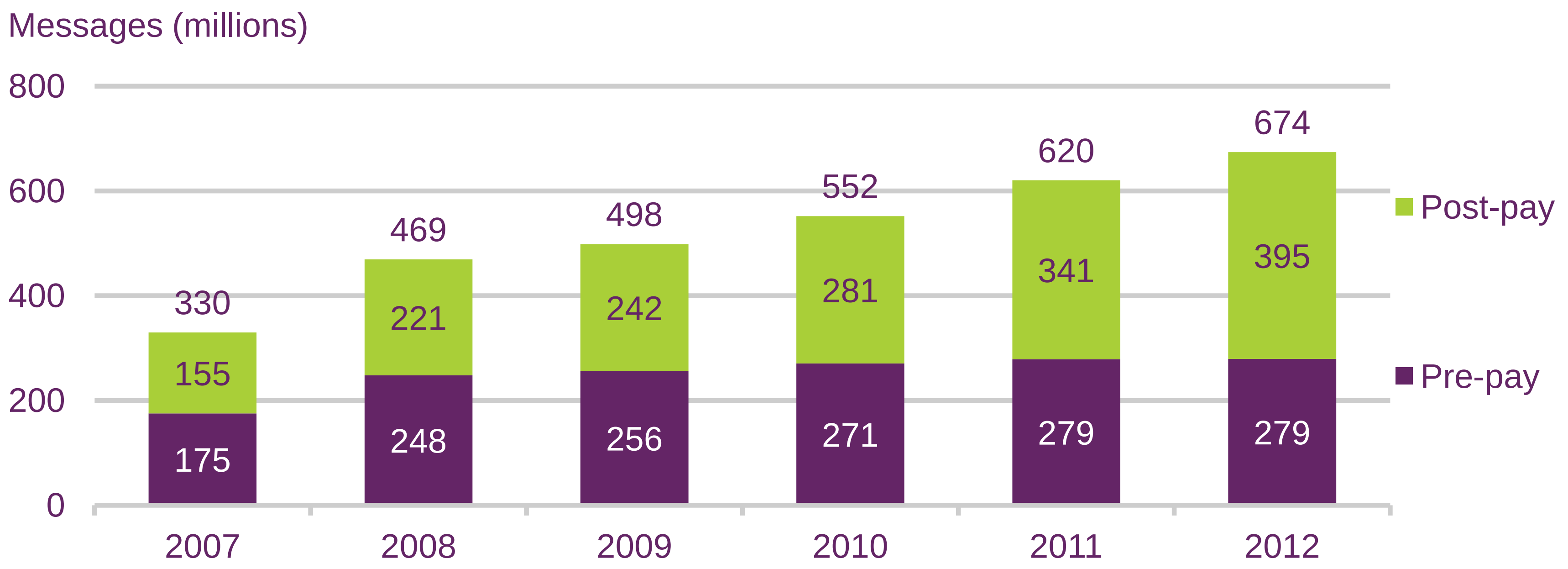
Volume of SMS messages sent, by pre-pay and post-pay: 2007 to 2012



Source: Ofcom / operators

Figure 5.40

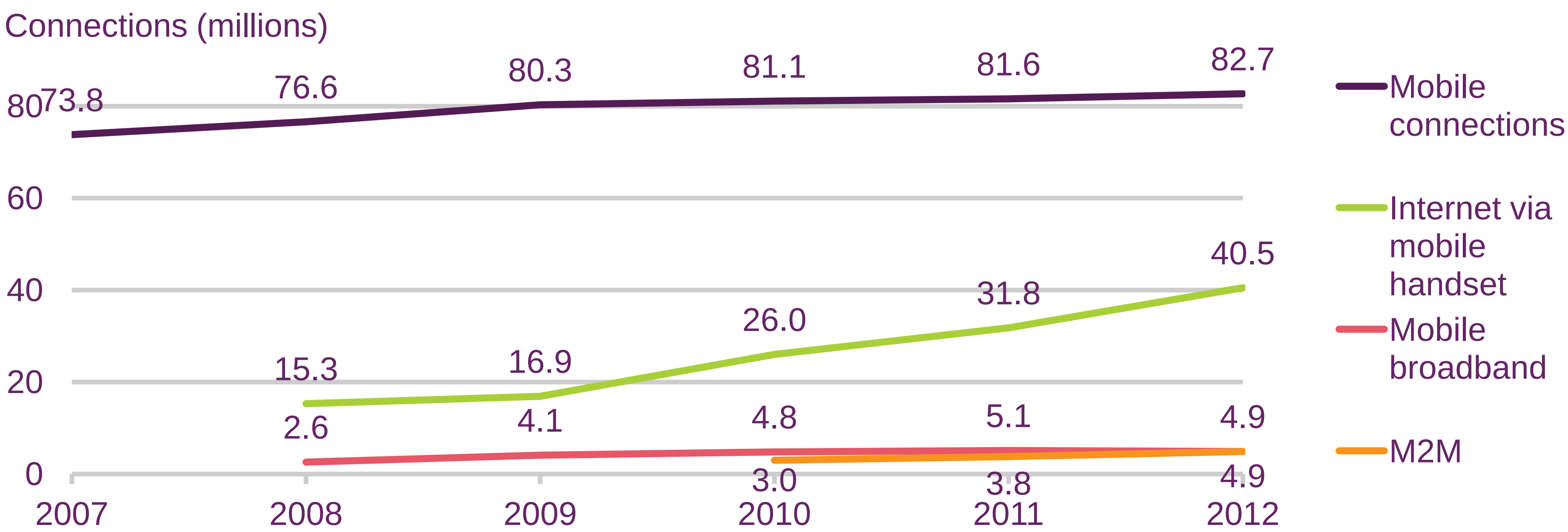
Volume of MMS messages sent, by pre-pay and post-pay, 2007 - 2012



Source: Ofcom / operators

Figure 5.41

Mobile connections, by type: 2007 to 2012



Source: Ofcom/operators and Ofcom market research.
Note: 'Internet via mobile handset' figures are based on Ofcom's market research on mobile internet use in Q1 of the year after the one stated; and Ofcom's subscriber figures obtained from operators that refer to the end of the year stated. M2M figures relate to the end of September of the year stated. The number of mobile subscribers includes mobile broadband subscribers but excludes M2M connections.

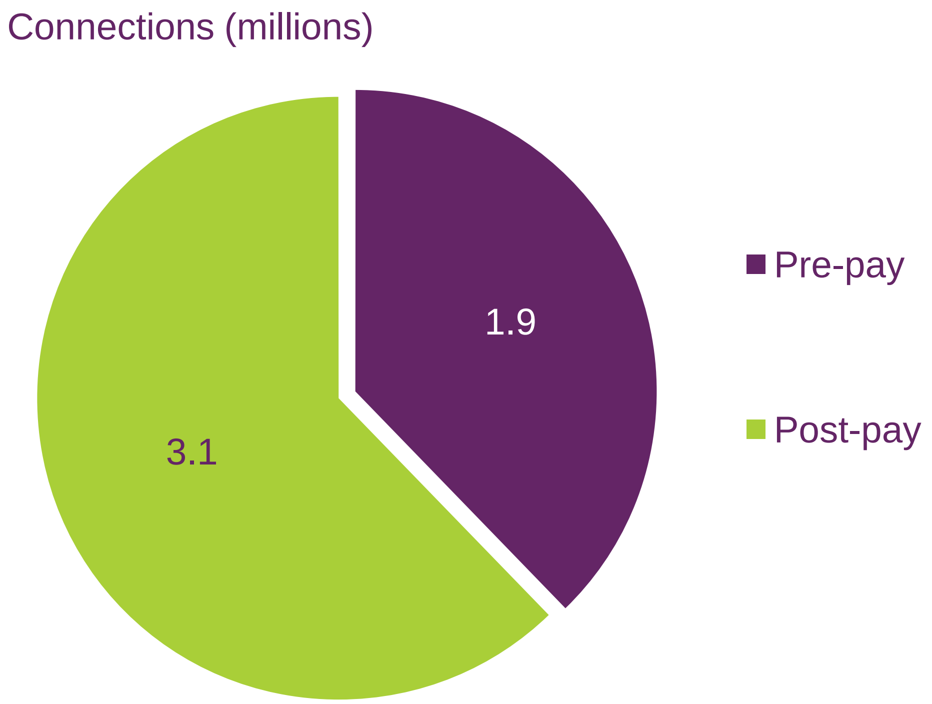
Figure 5.42

Number of active mobile subscribers, by pre-pay and post-pay: 2007 to 2012

Source: Ofcom / operators

Figure 5.43

Number of active mobile broadband subscribers, by pre-pay and post-pay: 2012

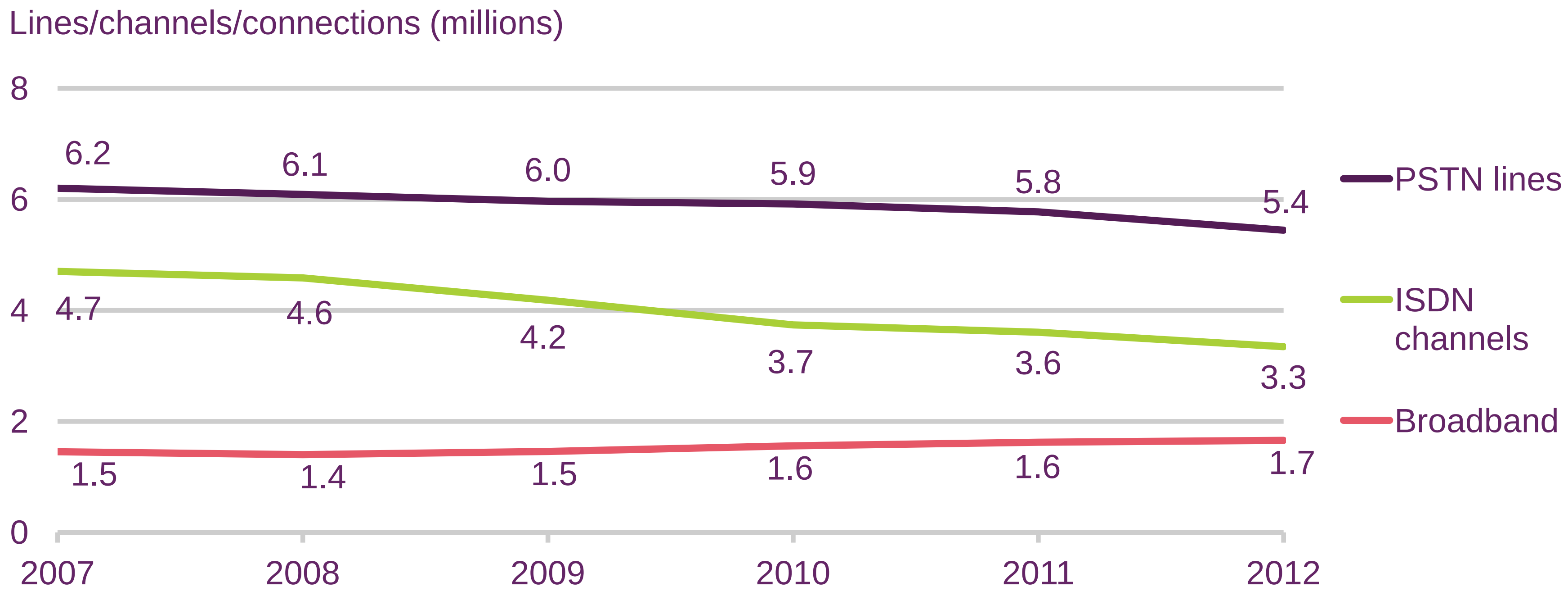


Source: Ofcom / operators

Business markets

Figure 5.44

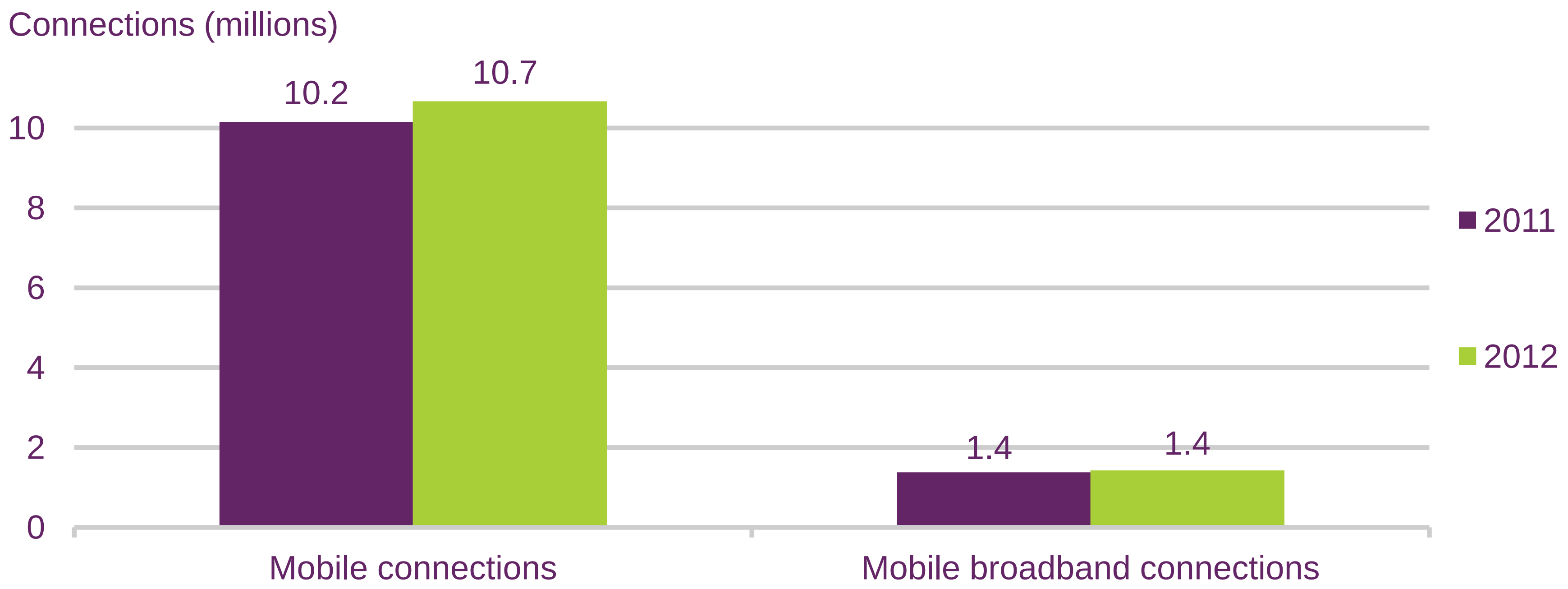
Business fixed voice and fixed broadband connections, 2007 to 2012



Source: Ofcom / operators.
Note: Fixed broadband includes FTTx and PSTN lines includes lines classed as ‘other’

Figure 5.45

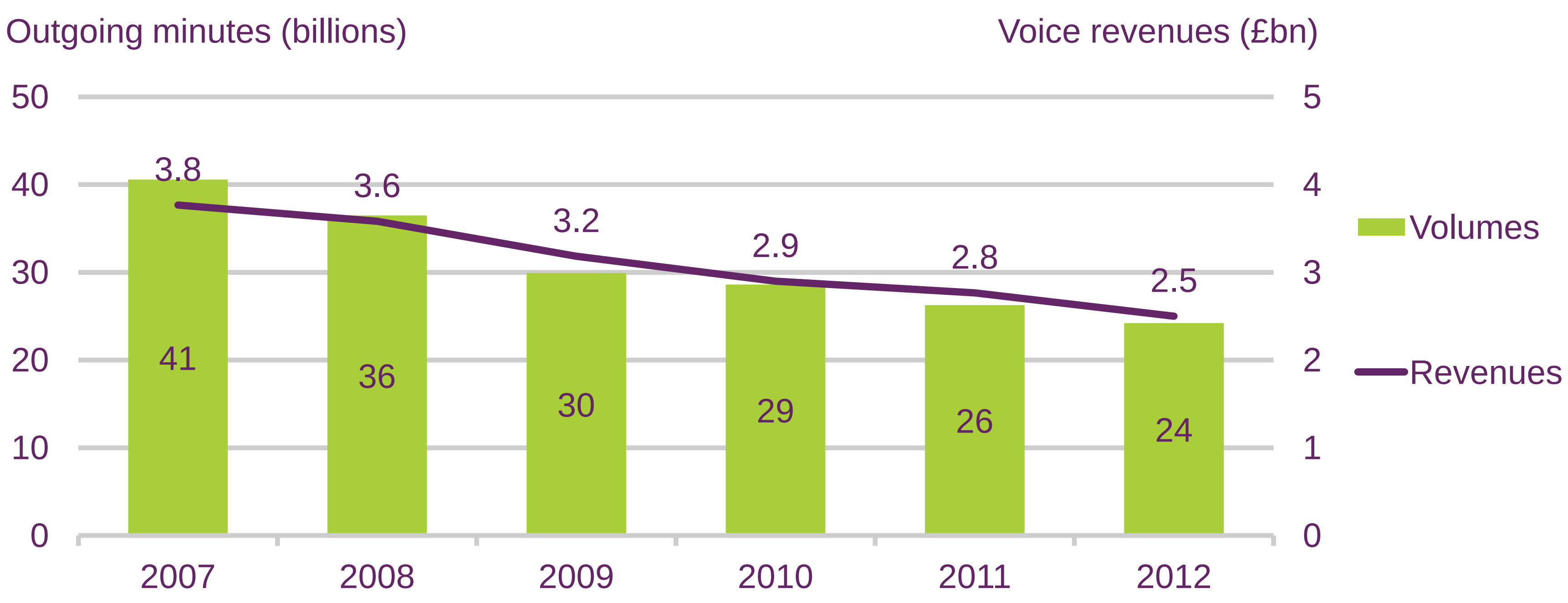
Business mobile and mobile broadband connections: 2011 and 2012



Source: Ofcom / operators
Note: Mobile broadband excludes smartphone data use.

Figure 5.46

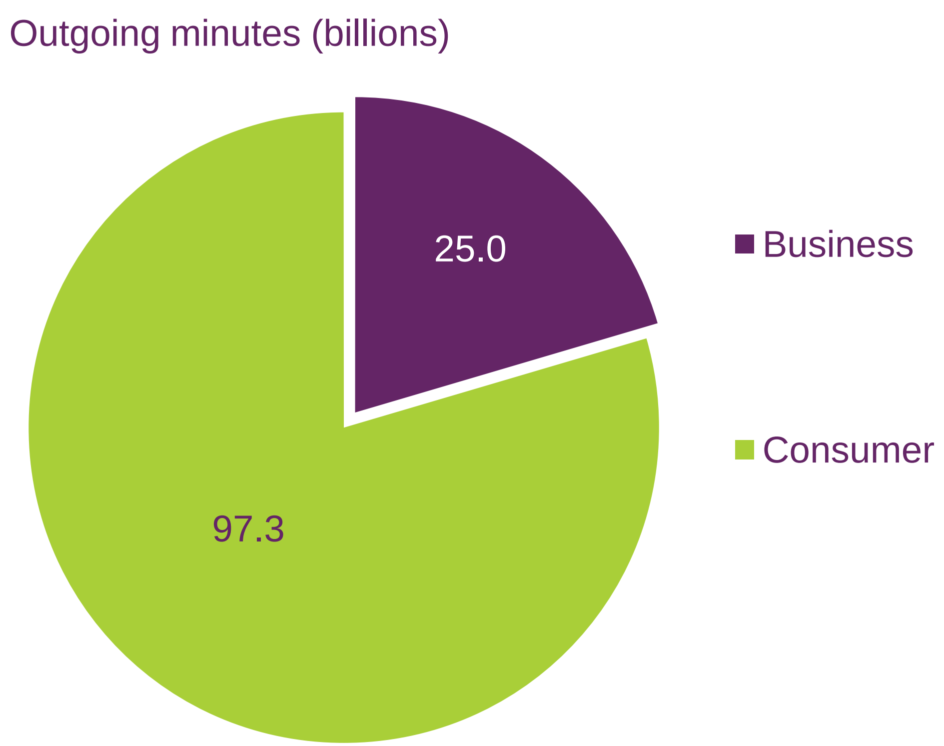
Business fixed voice volume and revenue



Source: Ofcom / operators.

Figure 5.47

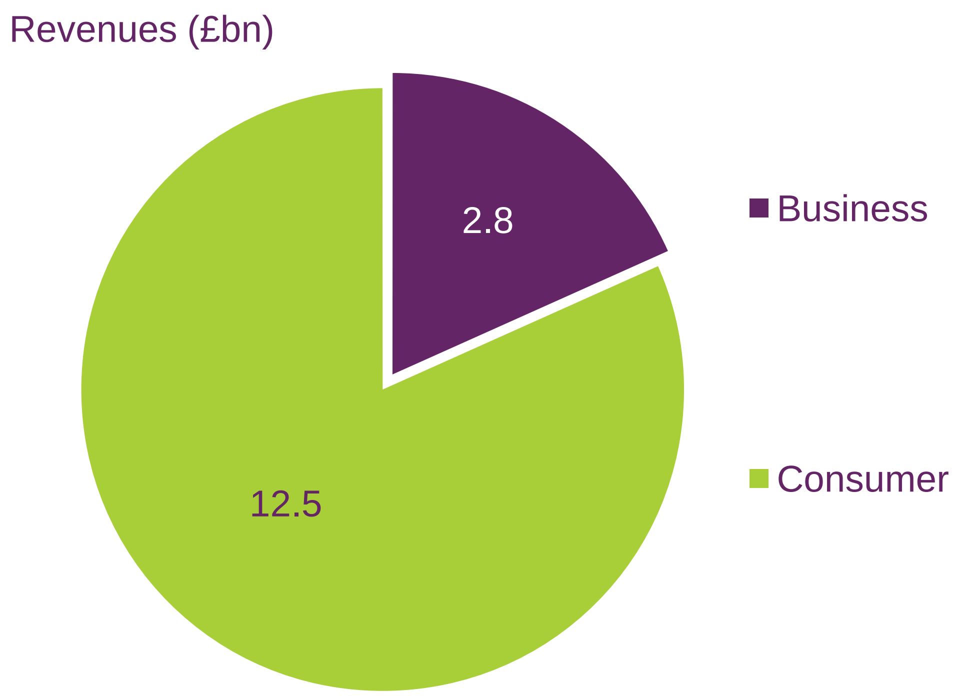
Mobile voice call volume, by consumer and business: 2012



Source: Ofcom / operators
Note: Contains estimates for some operators.

Figure 5.48

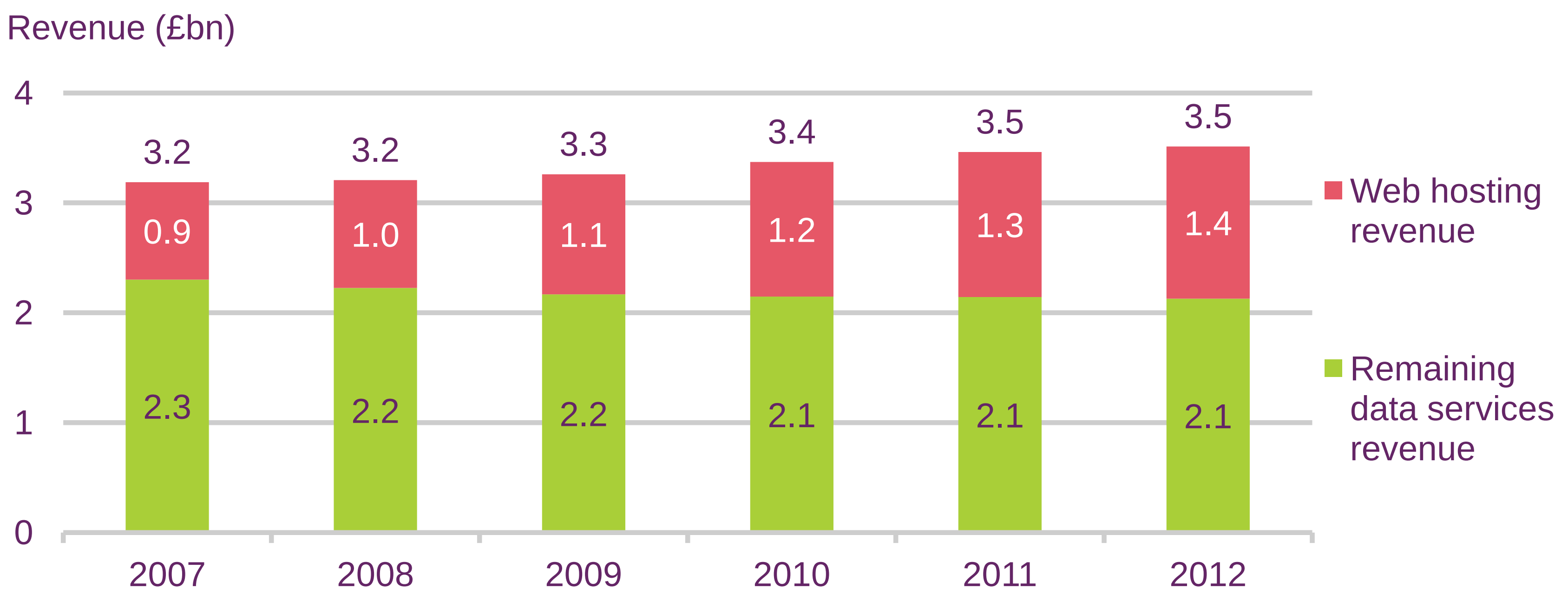
Mobile retail revenue by consumer and business



Source: Ofcom / operators
Note: Contains estimates for some operators.

Figure 5.49

Corporate data services connections and revenue



Source: IDC
Note: Data services means the following services for connections and revenue: Ethernet, IP VPN, digital leased lines, frame relay/ATM and, for revenue only, web hosting.

The telecoms user

Market overview

Figure 5.50

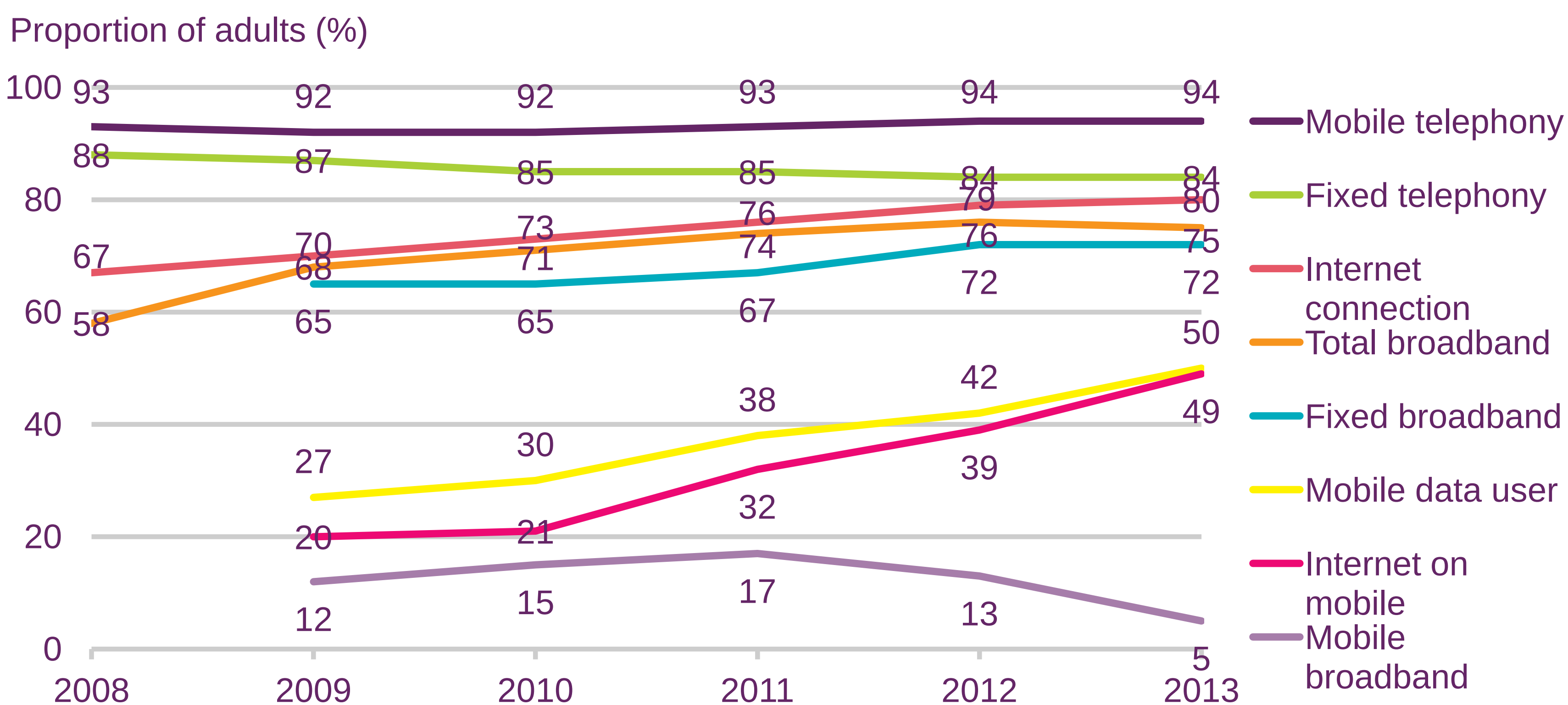
Average household spend on telecoms services

Source: Ofcom / operators / ONS

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

Figure 5.51

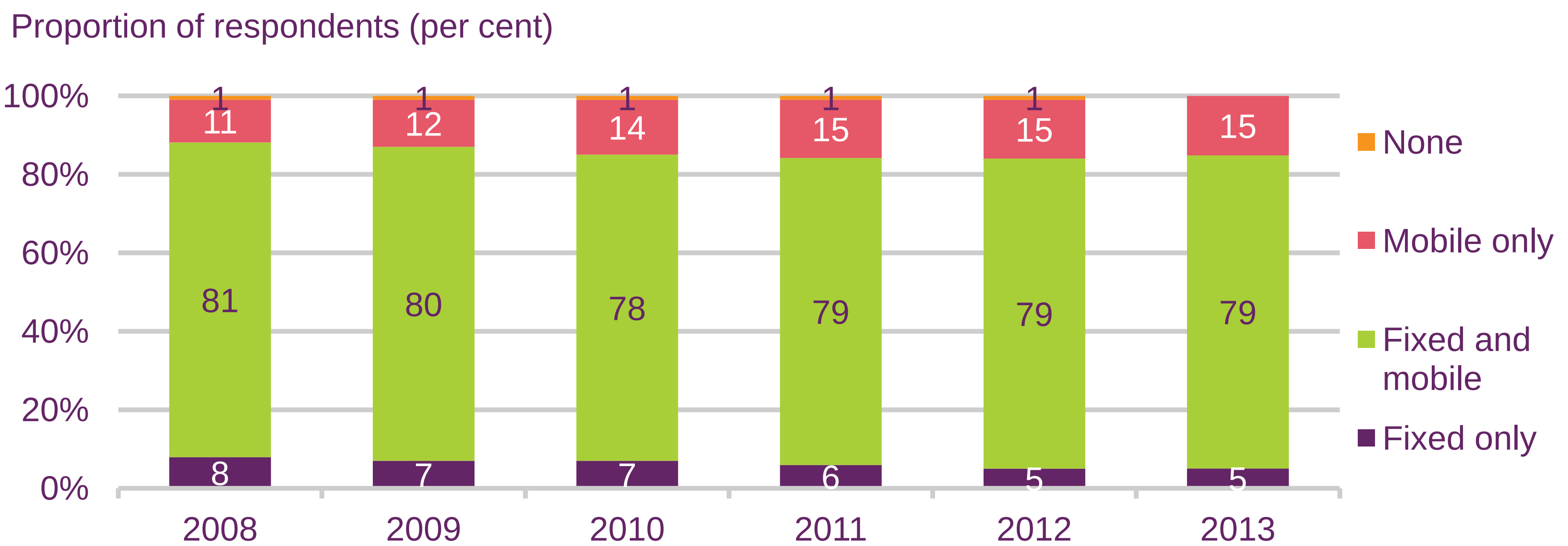
Household penetration of key telecoms technologies



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+
QE1: Does your household have a PC or laptop computer? / QE2: Do you or does anyone in your household have access to the internet/worldwide Web at home (via any device, e.g. PC, mobile phone etc)? / QE6: Which of these methods does your household use to connect to the Internet at home?

Figure 5.52

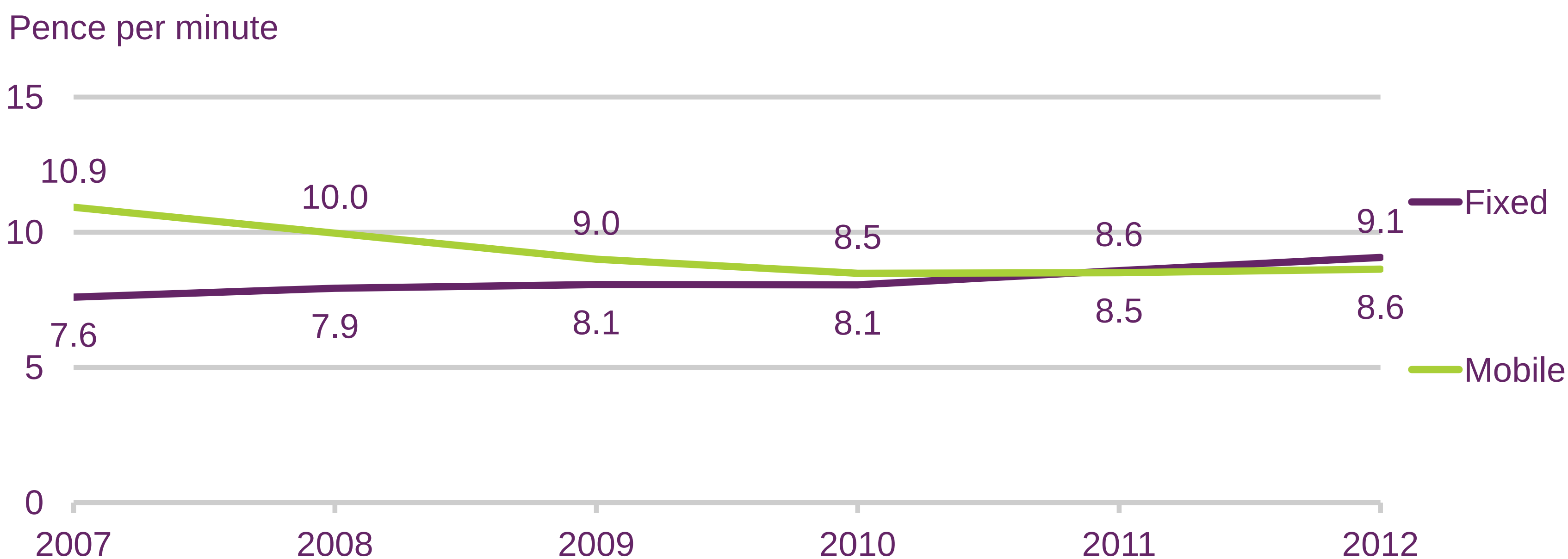
Household penetration of fixed and mobile telephony



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+

Figure 5.53

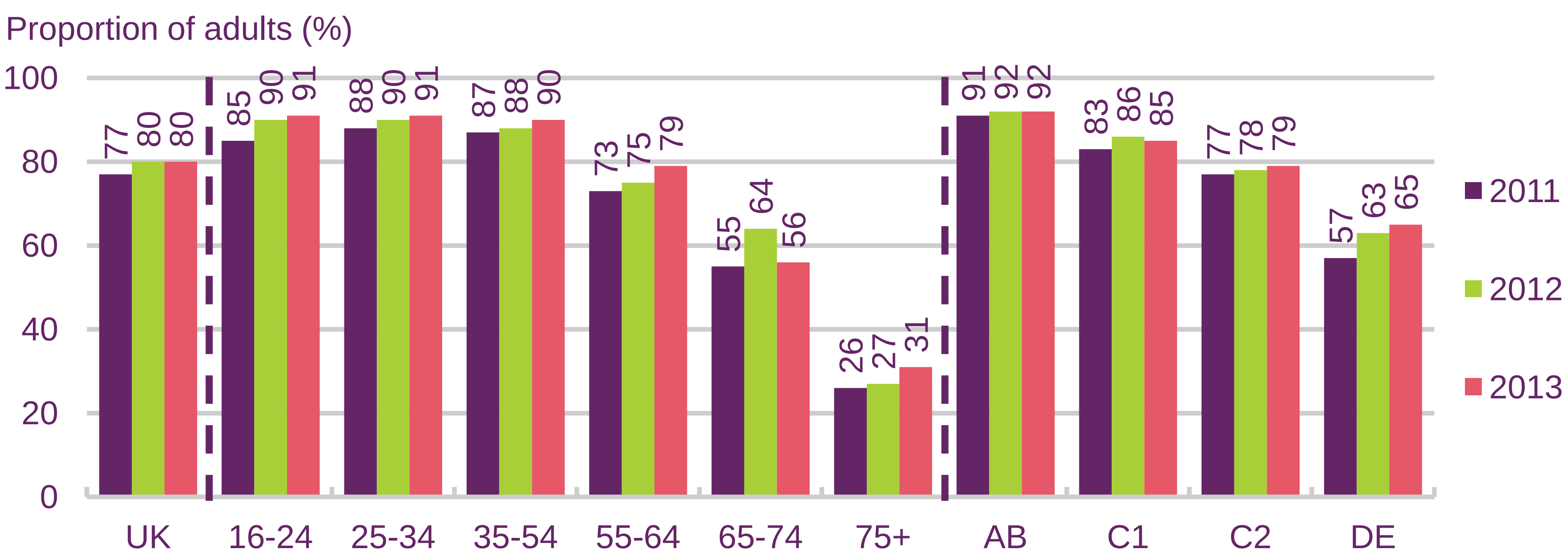
Comparison of average fixed and mobile voice call charges



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

Figure 5.54

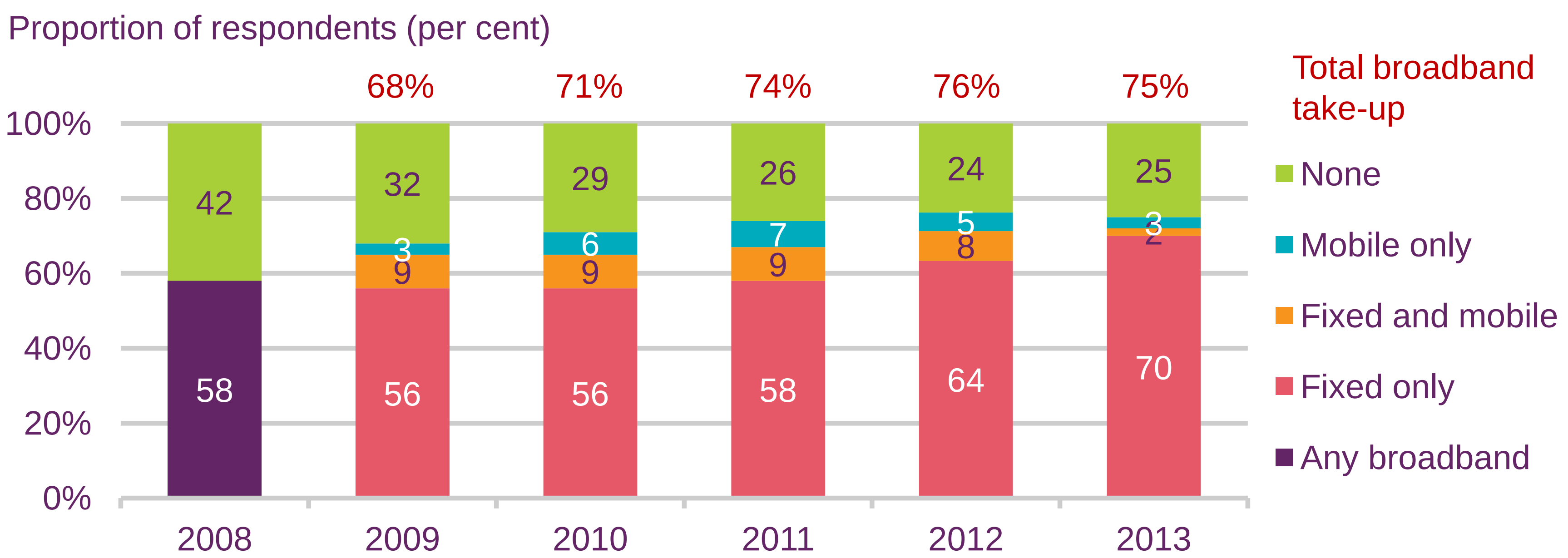
Home internet access: by age and socio-economic group



Source: Ofcom research, data as at Q1 2013.
Base: All adults aged 16+
QE2: Do you or does anyone in your household have access to the internet/ worldwide web at home?

Figure 5.55

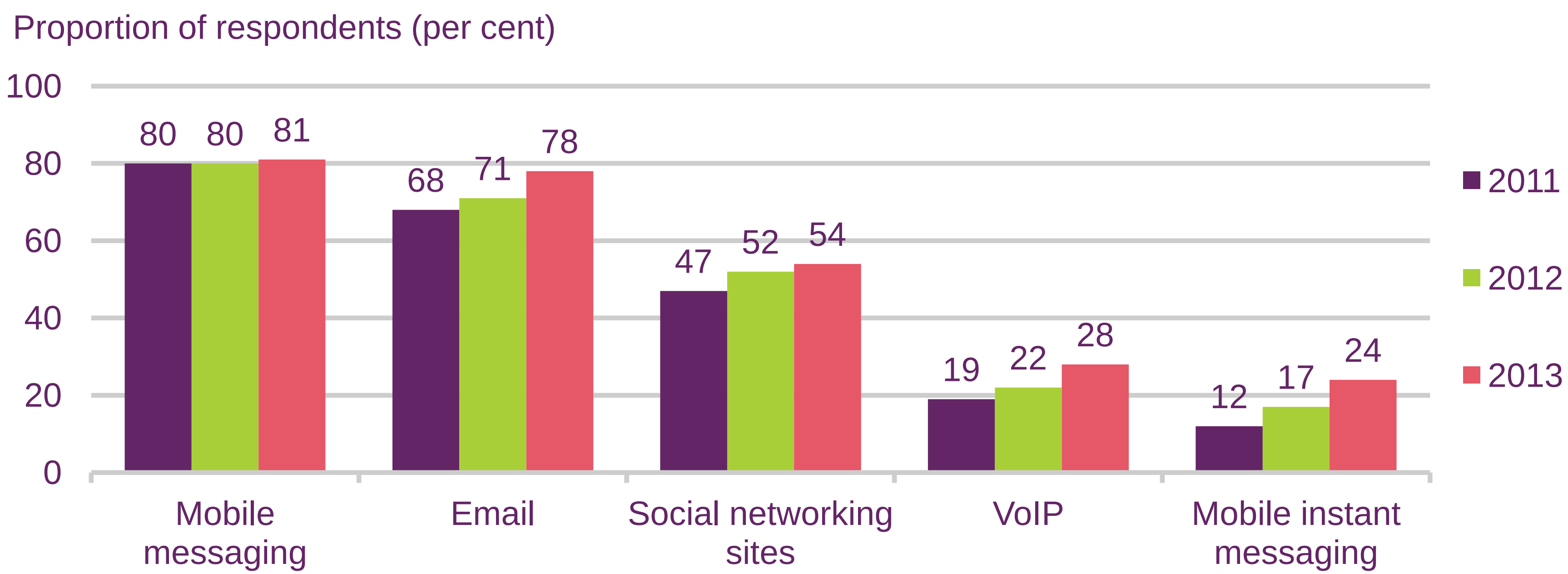
Household penetration of fixed and mobile broadband



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+

Figure 5.56

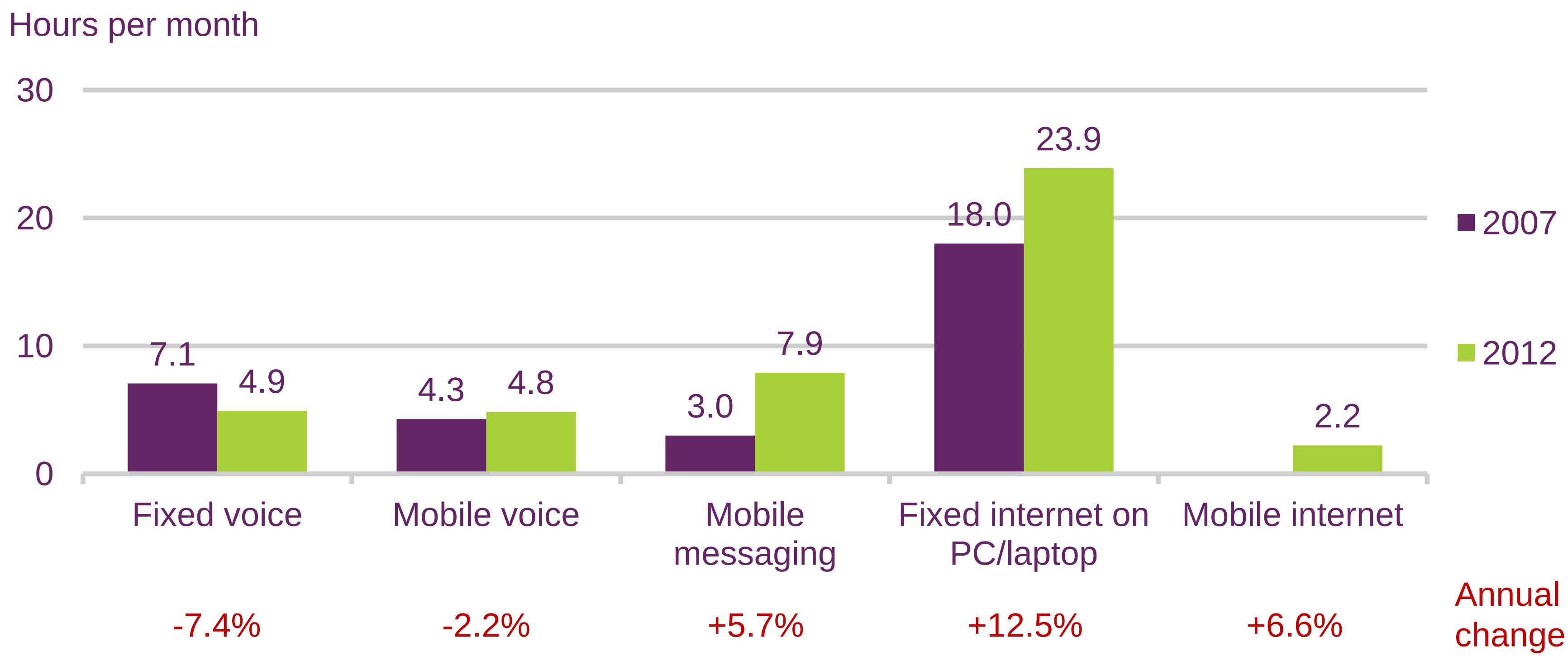
Use of methods of communication other than traditional voice telephony



Source: Ofcom research, data as at Q1 of each year
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 used one of these services to make voice calls using the Internet at home? (answers used relate to current use).

Figure 5.57

Average monthly time per person spent using telecoms services

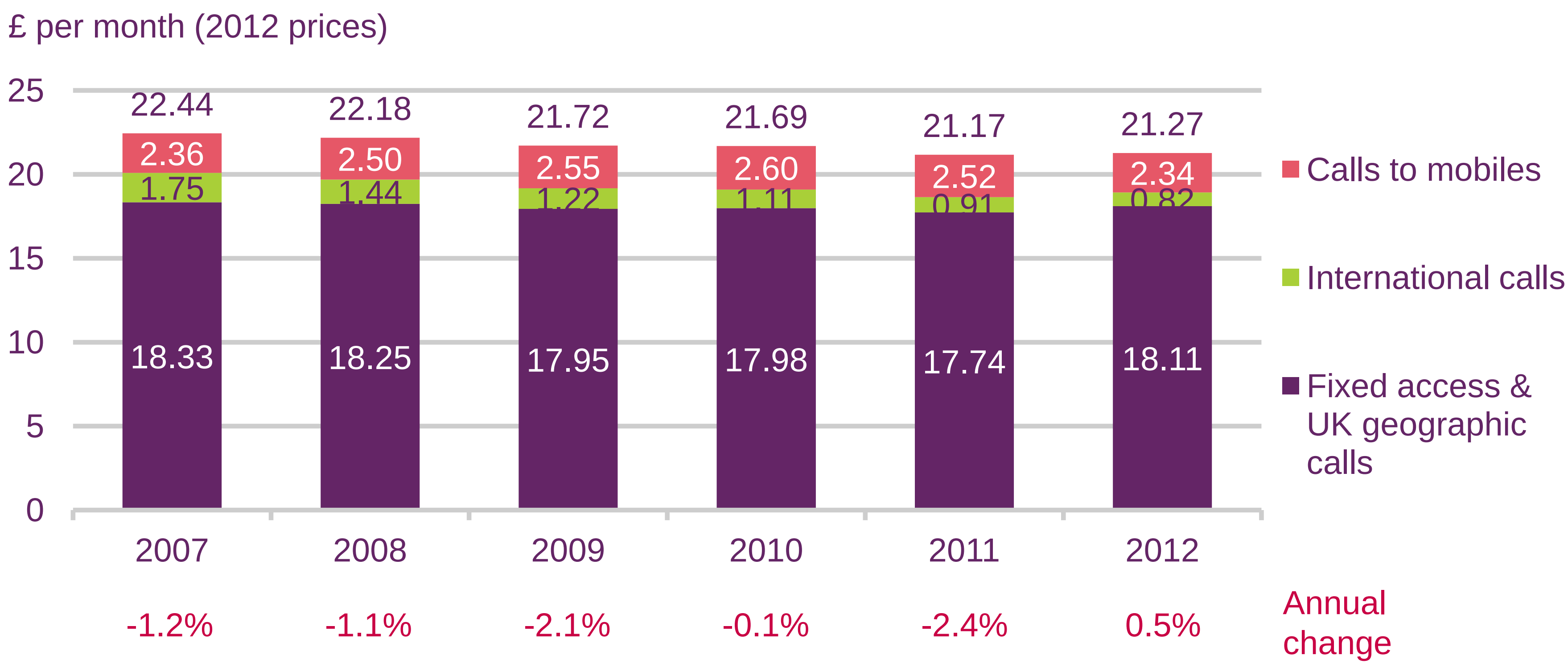


Source: Ofcom / operators / ComScore MMX, UK, home and work panel, January to December 2007 and January to December 2012 / US Census Bureau / ComScore GSMA MMM, UK, browser access only, on-network, December 2011 and December 2012
Note: Includes estimates where Ofcom does not receive data from operators; voice calls include incoming and outgoing calls; fixed voice call figures include NTS voice calls; mobile messaging figures assume an average of two minutes per SMS and MMS message and one minute per IM message; Ofcom's estimates of fixed and mobile internet use per person are based on comScore data and exclude time spent watching online video and listening to streamed music; Mobile internet use includes on-network traffic only, and excludes time spent using internet connected mobile applications.

Fixed voice services

Figure 5.58

Real price of a basket of residential fixed voice services

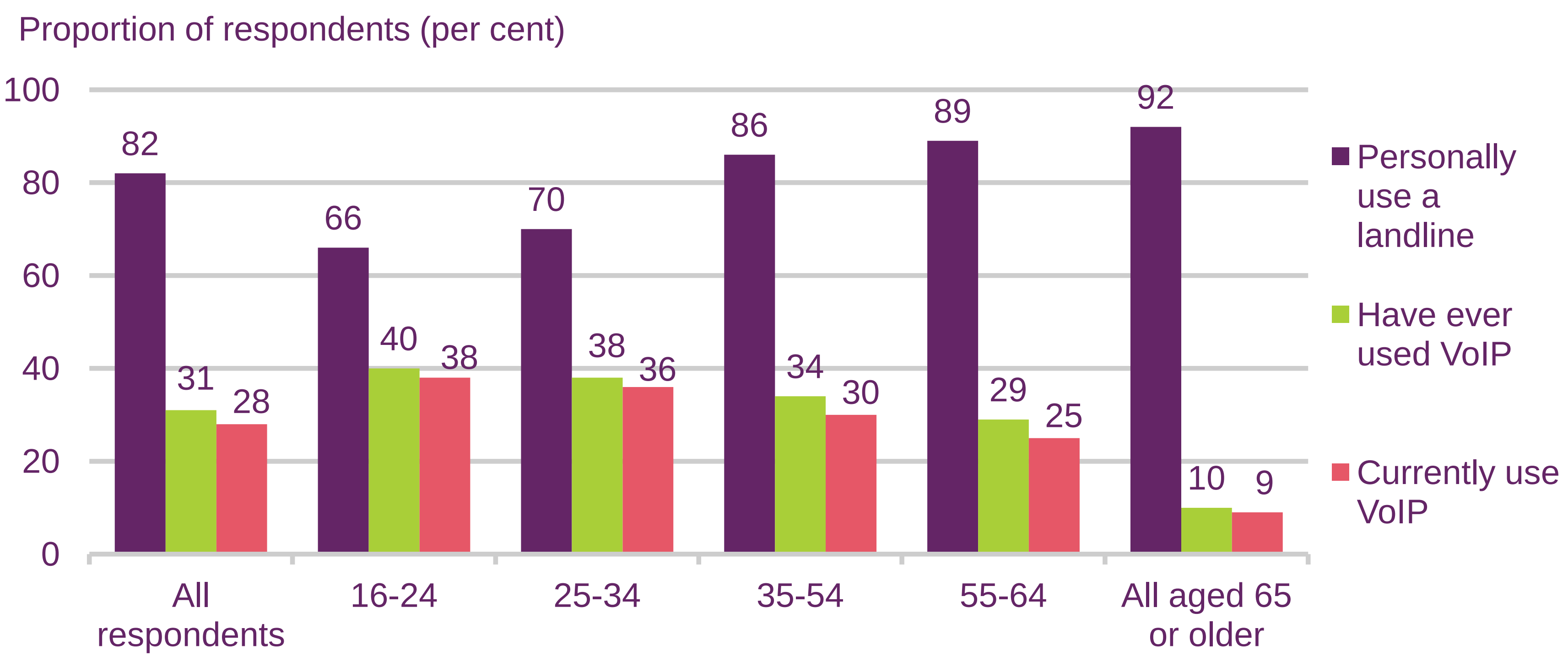


Source: Ofcom / operators

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

Figure 5.59

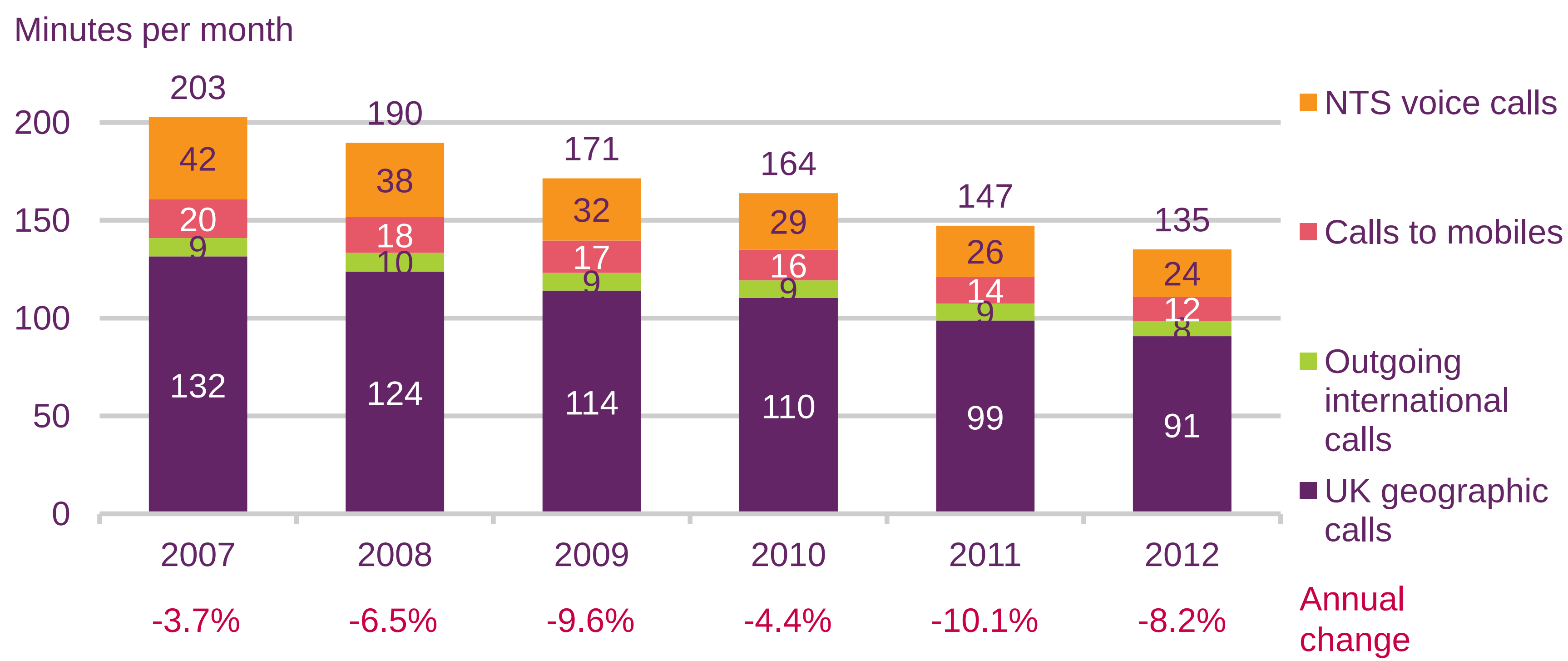
Use of fixed voice communication services in the home



Source: Ofcom research Q1 2011
Base: All adults aged 16+

Figure 5.60

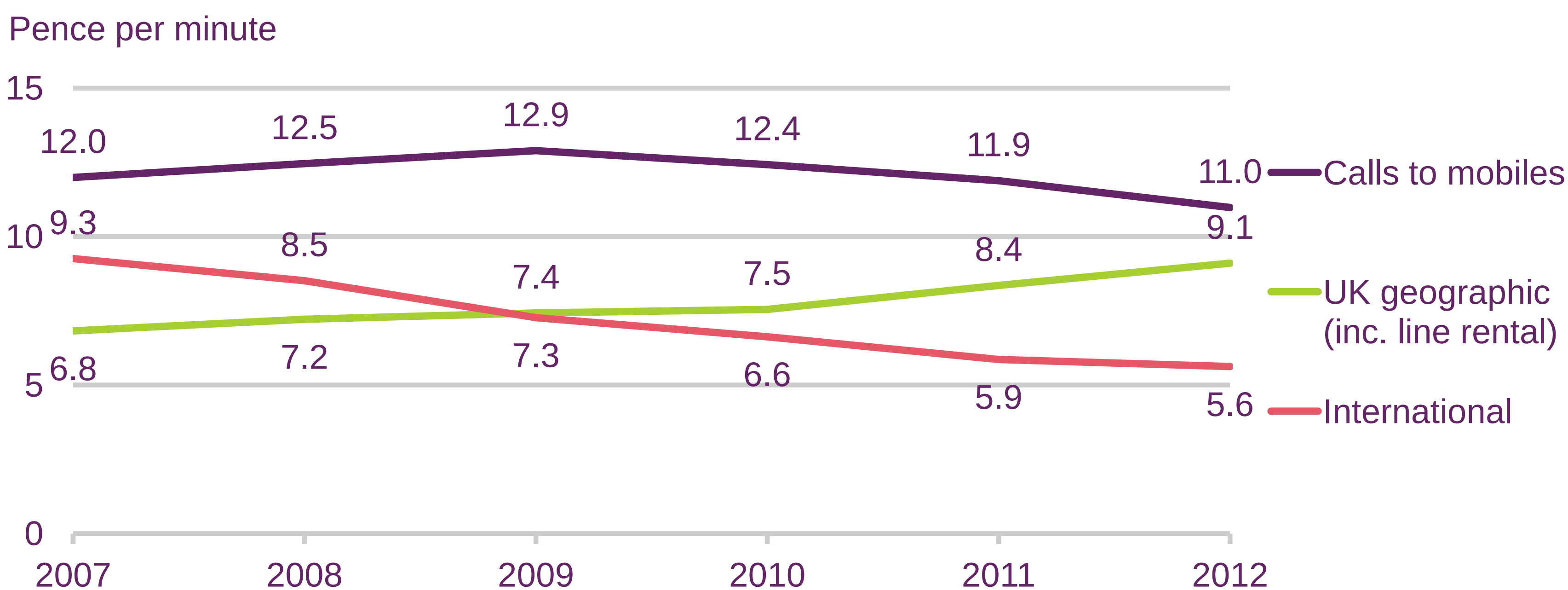
Average monthly outbound fixed voice call volumes per person



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

Figure 5.61

Average revenue per fixed-voice call minute



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; UK geographic calculation includes line rental revenues; Excludes VAT.

Figure 5.62

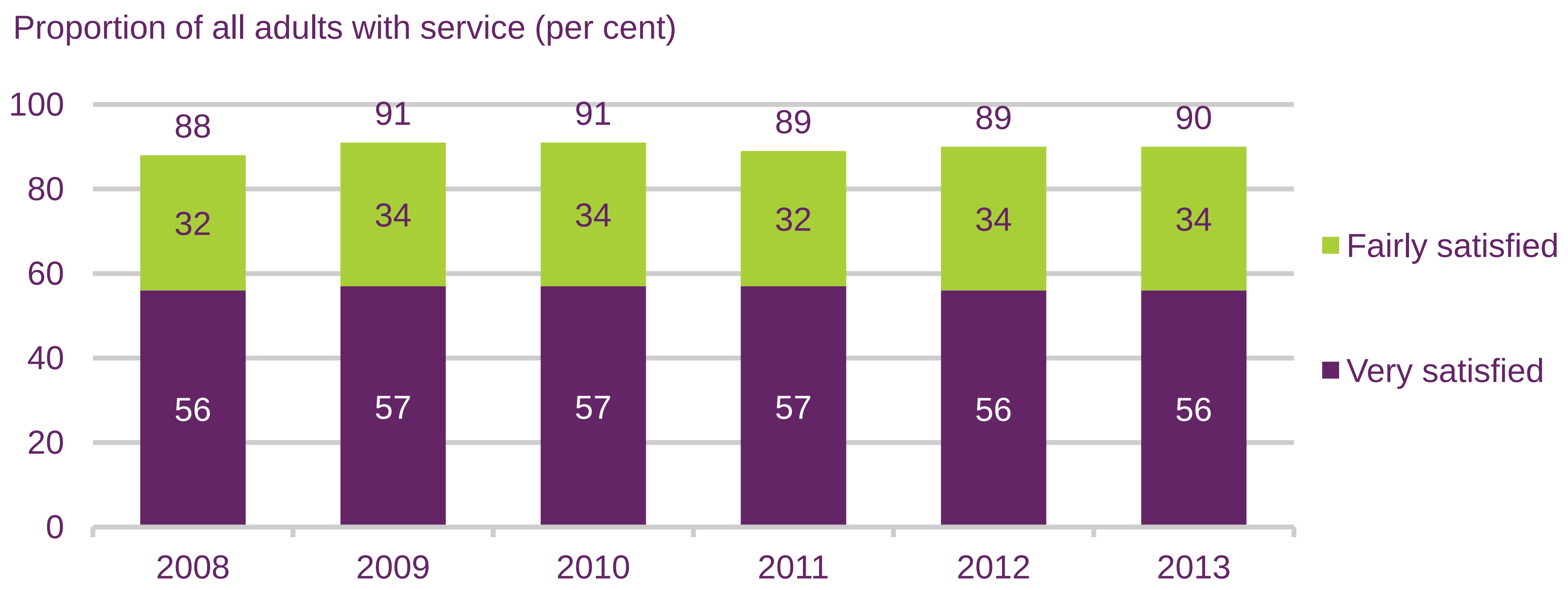
Standalone fixed-line tariff analysis

Provider	2012			2013		
	With weekend calls	With evening and weekend calls	With anytime calls	With weekend calls	With evening and weekend calls	With anytime calls
BT	£14.60 (£10.75)	£17.75 (£13.90)	£19.50 (£15.65)	£15.45 (10.75)	£18.75 (£14.05)	£20.60 (£15.90)
Sky	-	£12.25 (£9.95)	£17.25 (£14.95)	£14.50	-	£19.50
TalkTalk	-	£17.41[1] (£13.11) [1]	£20.01 (£15.71)	-	-	-
Virgin Media	-	£18.50[2]	£21.90[2]	-	-	-

Source: Pure Pricing UK Broadband Pricing Briefing, March 2012 and March 2013
Note: All tariffs exclude activation charges and promotional discounts and include VAT; all tariffs are the lowest price available; contract lengths vary; figures in brackets require prepayment of twelve month's line rental; [1] also includes anytime calls to TalkTalk landlines; [2] also includes calls to Virgin Mobiles

Figure 5.63

Residential consumer satisfaction with fixed-line services

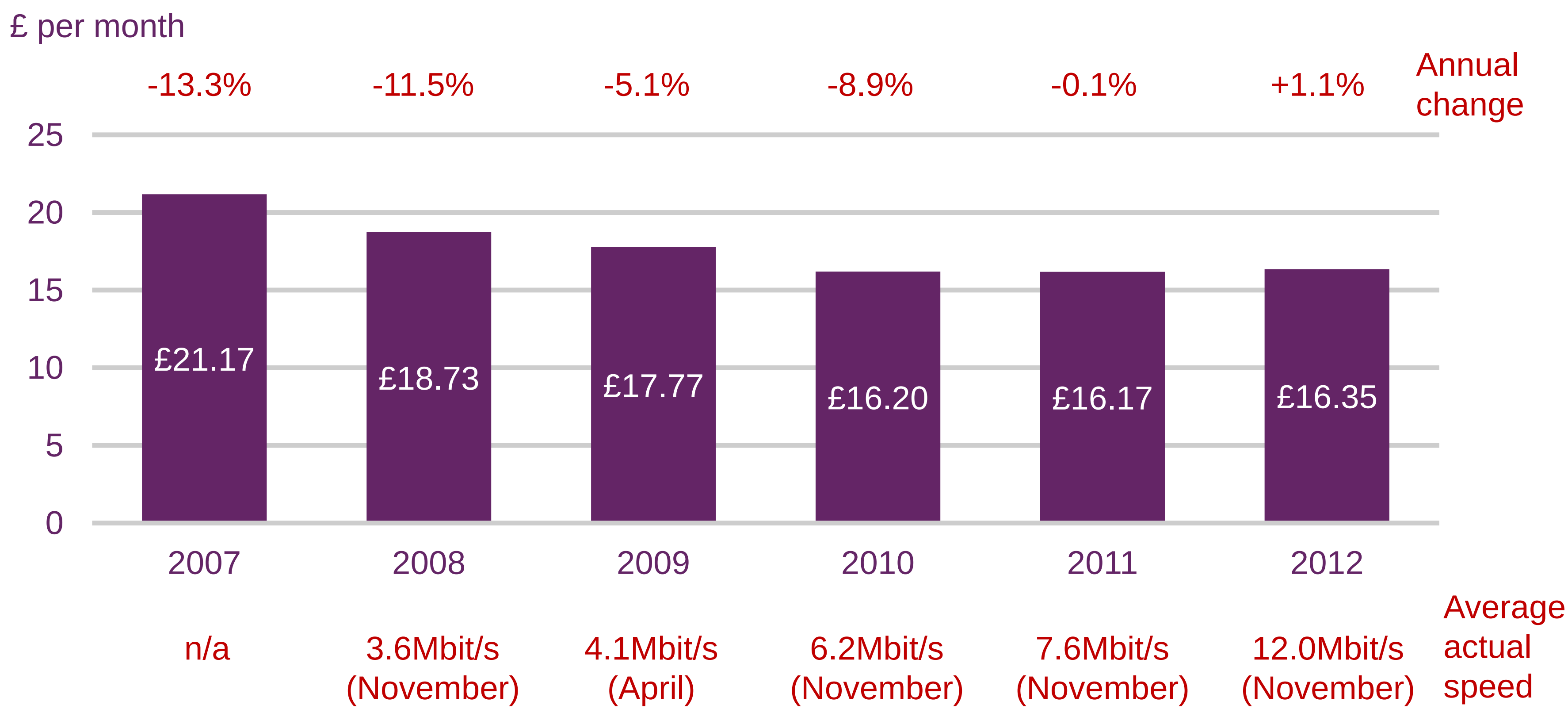


Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+ with a fixed line phone
Note: Only includes those who expressed an opinion

Fixed broadband services

Figure 5.64

Real average monthly price of a residential fixed broadband connection



Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators; includes VAT; adjusted for RPI

Figure 5.65

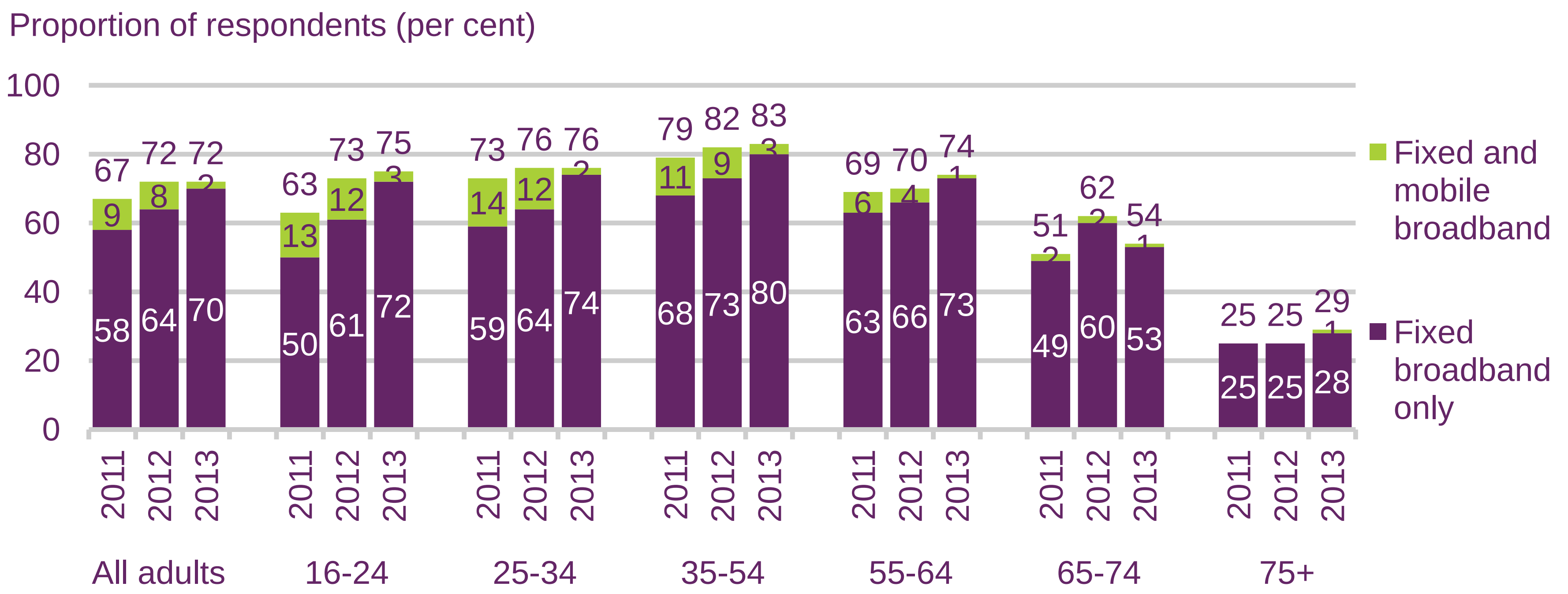
Lowest -cost fixed broadband options from major ISPs

Provider	Fixed broadband only	Fixed broadband and calls	Fixed broadband and fixed line	Fixed broadband and mobile	Fixed broadband and pay-TV	Fixed broadband, fixed line and mobile	Fixed broadband, fixed line and pay-TV
BT	-	-	£28.45 (£23.75)	-	-	-	£33.45 (£28.75)
EE	-	-	£24.00	-	-	£19.00[2]	-
O2	£13,50[1]	-	£26.50	£8.50[1,2]	-	£21.50[2]	-
Plusnet	-	£5.99[1]	£19.98 (£16.48)	-	-	-	-
Sky	-	-	£24.50 (£19.95)	-	-	-	£36.00 (£31.45)
TalkTalk	-	-	£21.45 (£16.00)	-	-	-	£30.45 (£25.00)
Virgin Media[3]	£22.50	-	£29.49 (£24.50)	£22.50[2]	£36.50	£29.49[2] (£24.50[2])	£32.99 (£28.00)

Source: Pure Pricing UK Broadband Pricing Briefing, March 2012 and March 2013
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, plus availability of TV channels included within packages may differ by operator and option; figures in brackets require pre-payment of twelve months' line rental; [1] Also requires BT fixed-line rental at £15.45 a month/£129 pre-payment for a year; [2] plus cost of mobile tariff; [3] discounts available on Virgin Mobile tariffs.

Figure 5.66

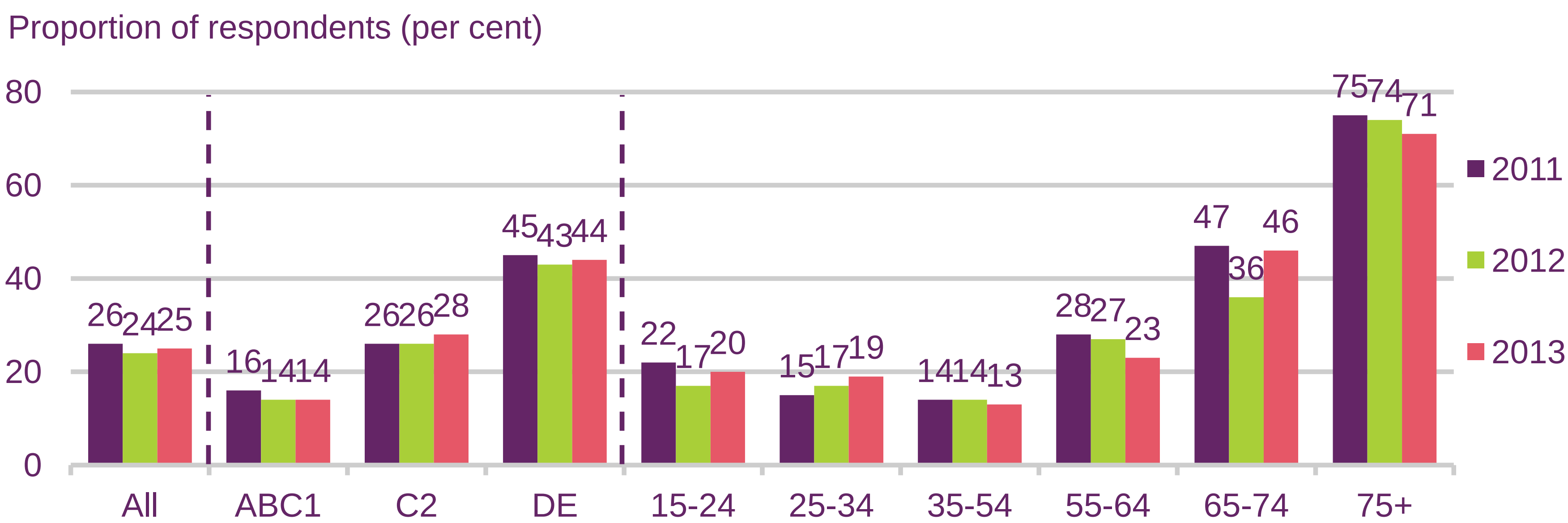
Take-up of fixed broadband, by age



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+

Figure 5.67

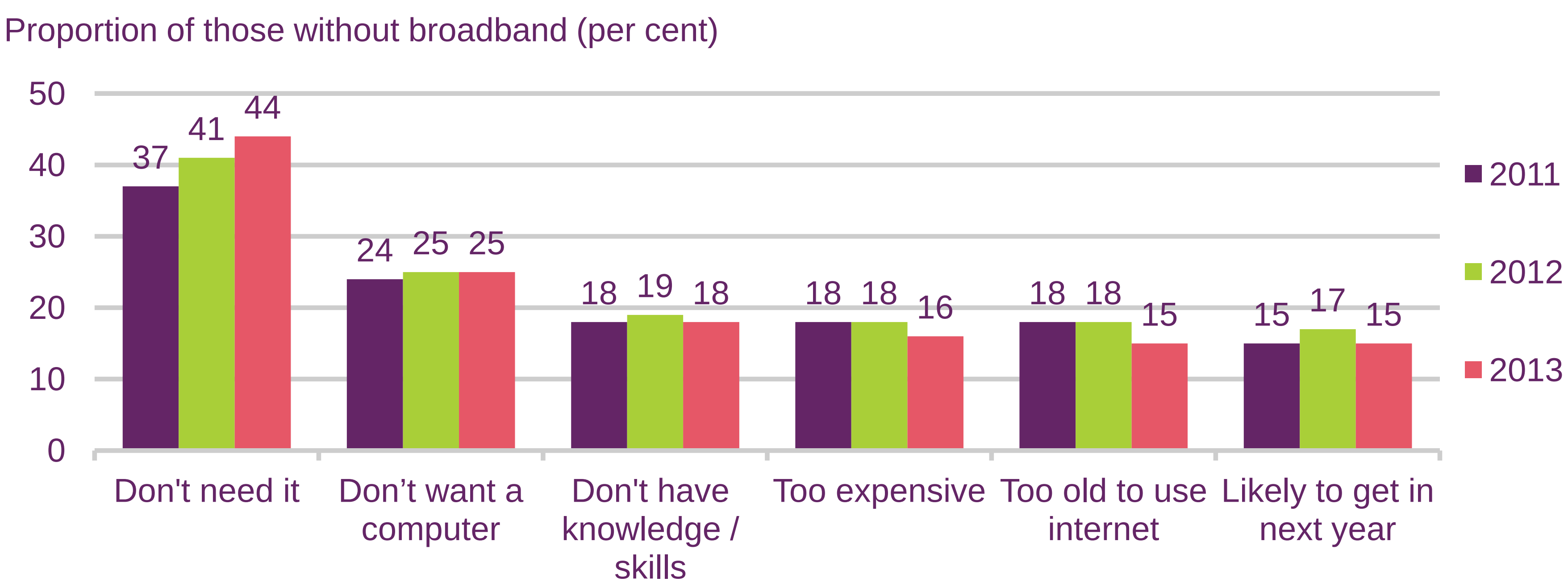
Non-ownership of home broadband, by socio-economic group and age



Source: Ofcom research, data as at Q1 2013
Base: All adults 16+

Figure 5.68

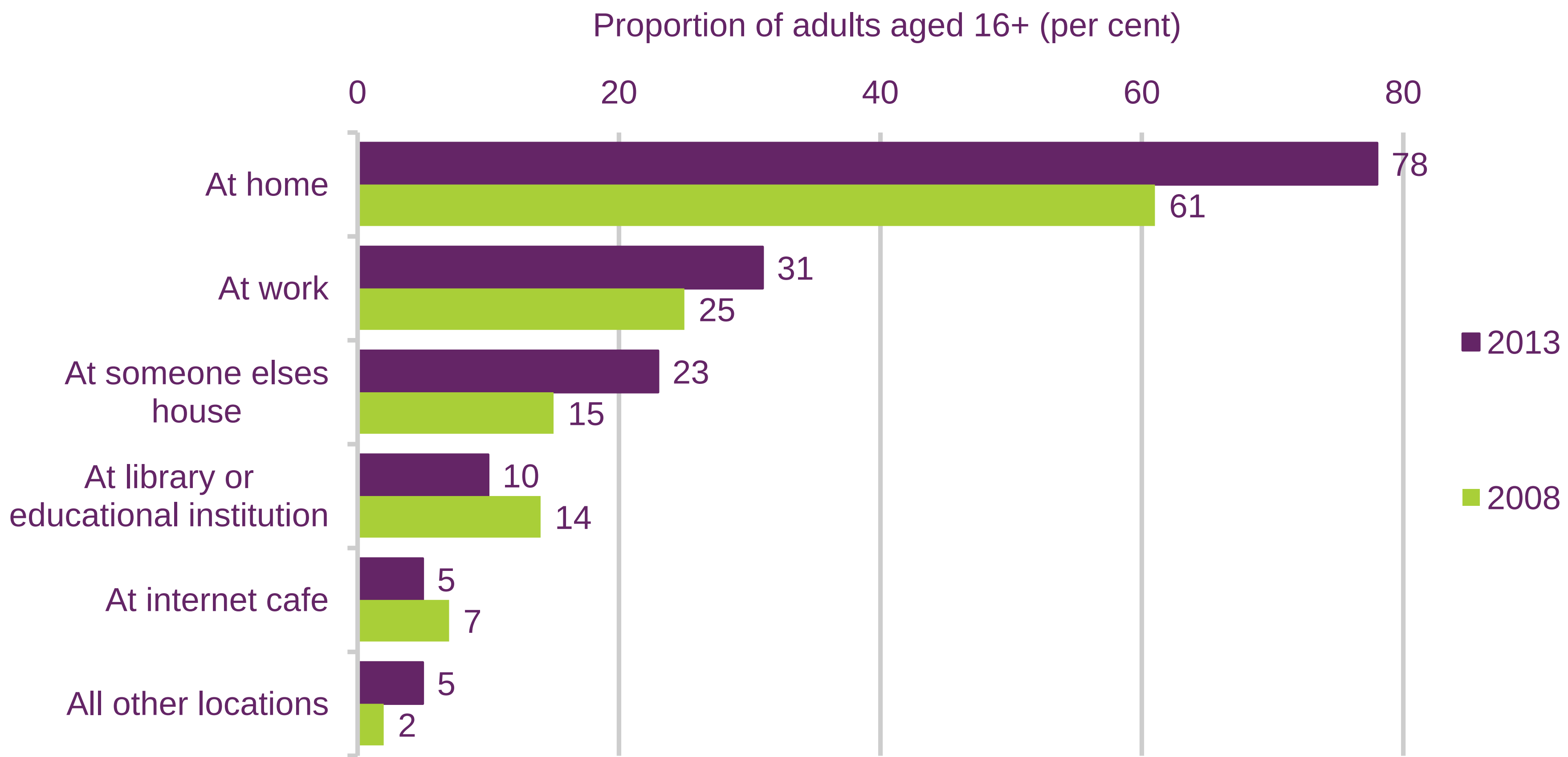
Main reasons for not having a home broadband connection



Source: Ofcom research, data as at Q1 of each year
Base: All adults without the internet aged 16+
Note: 2% of people without the internet in Q1 2013 did not know what their main reason was or provided an ‘other’ reason

Figure 5.69

Location of internet access

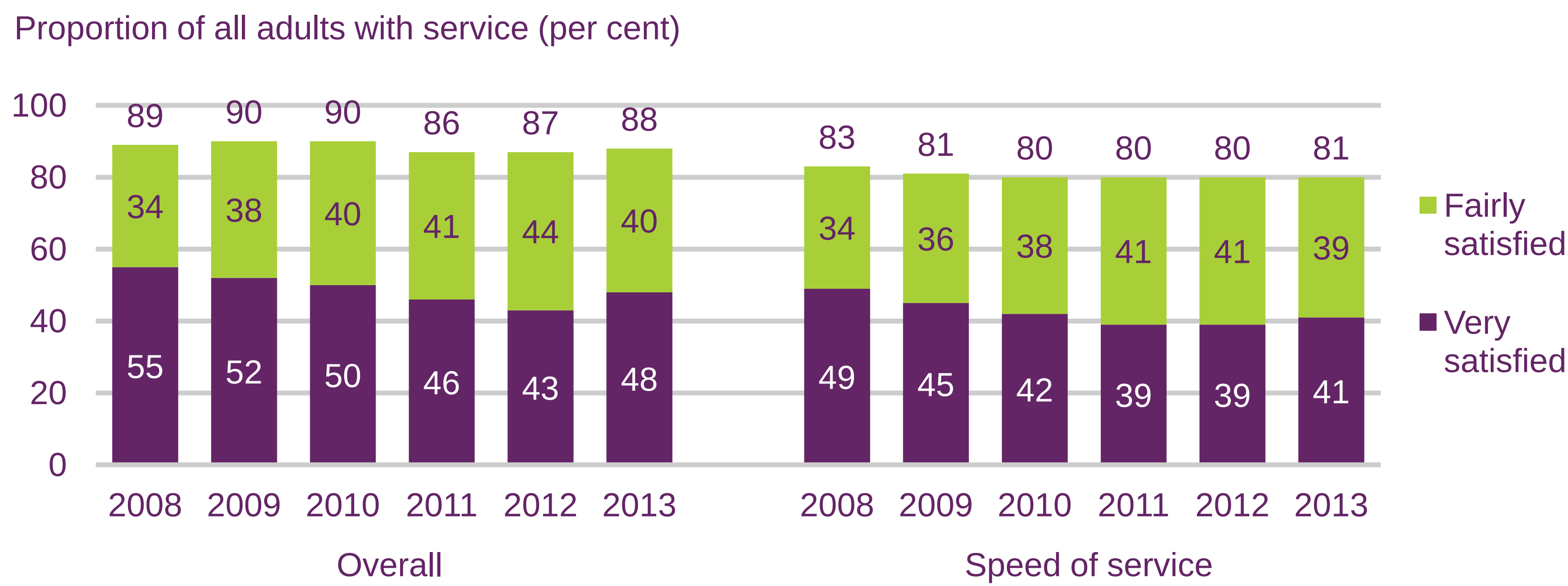


In total 82% of UK adults used the internet in Q1 2013

Source: Ofcom research , data as at Q1 of each year
Base: All internet users aged 16+

Figure 5.70

Satisfaction with aspects of fixed broadband service

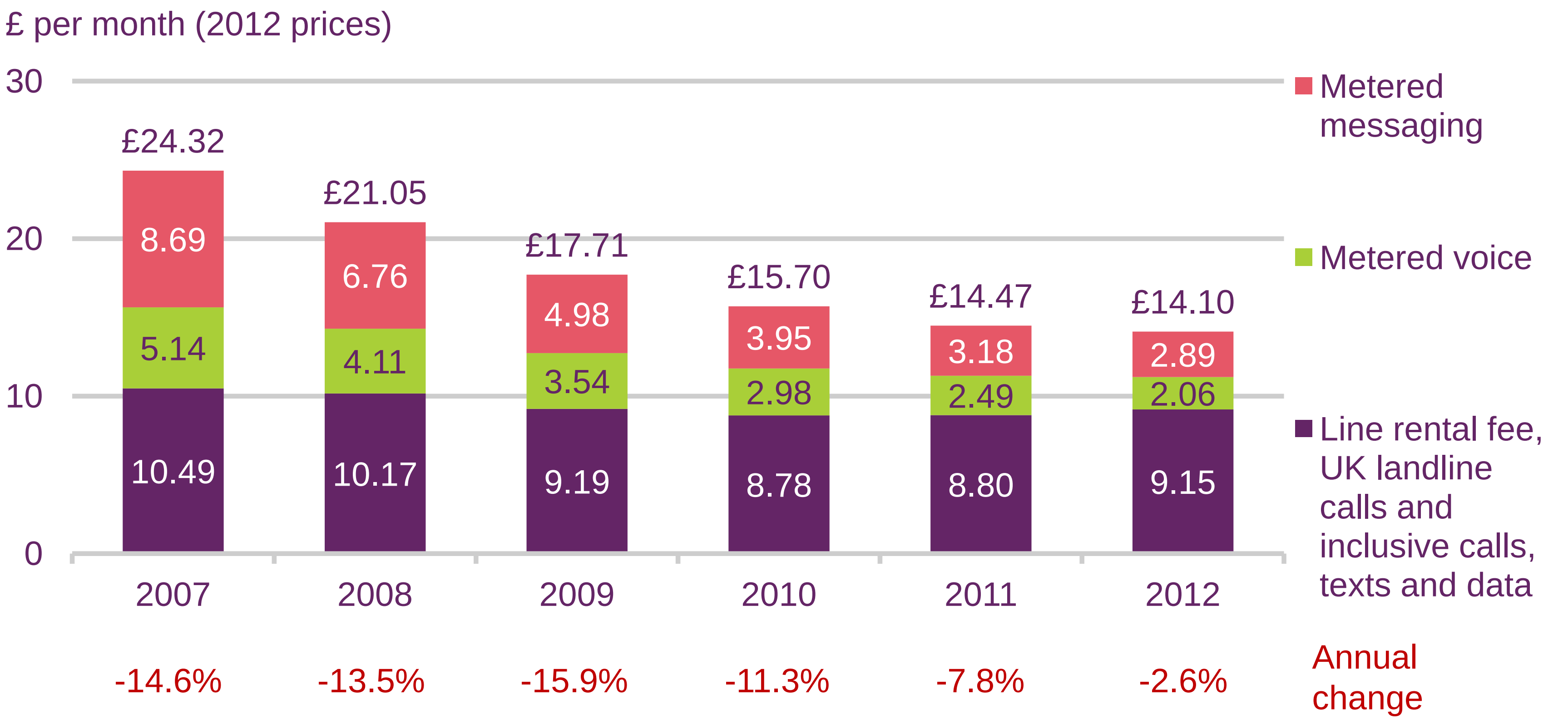


Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+ with a fixed broadband connection
Note: Includes only those who expressed an opinion

Mobile voice and data services

Figure 5.71

Real cost of a basket of mobile services

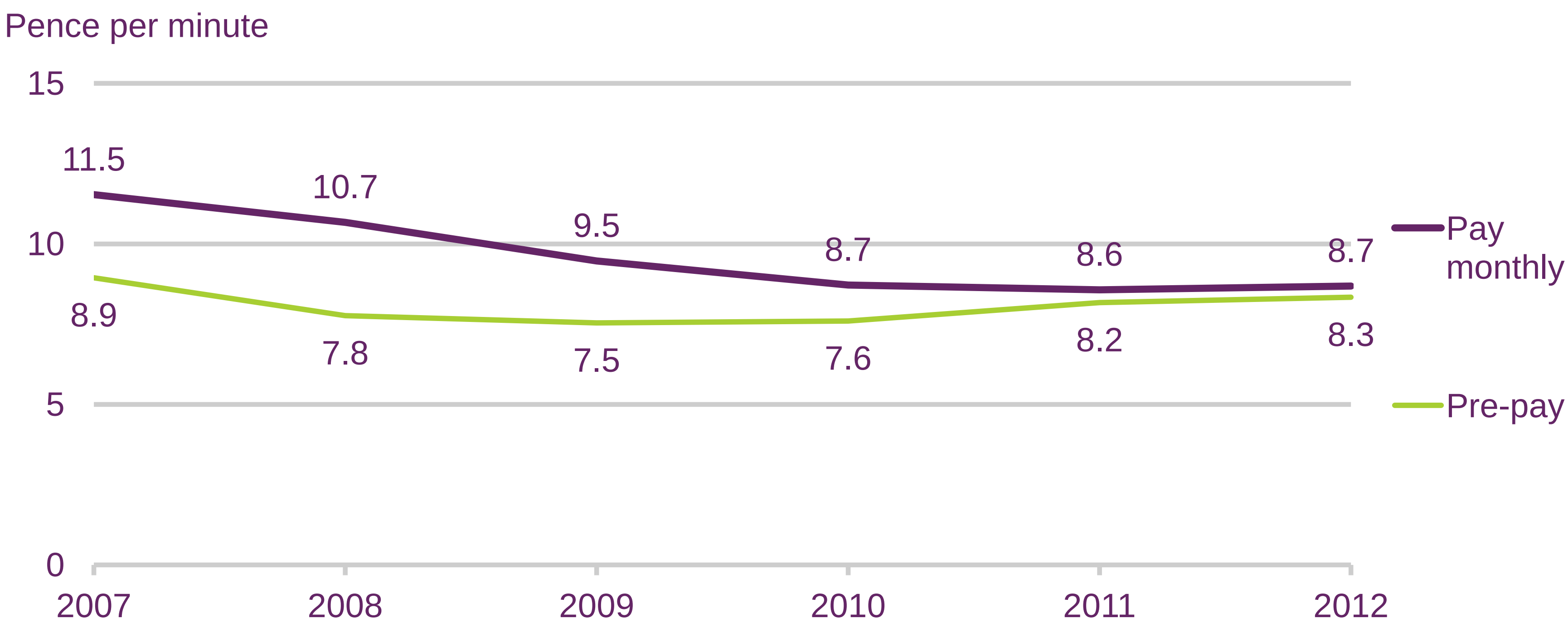


Source: Ofcom / operators

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

Figure 5.72

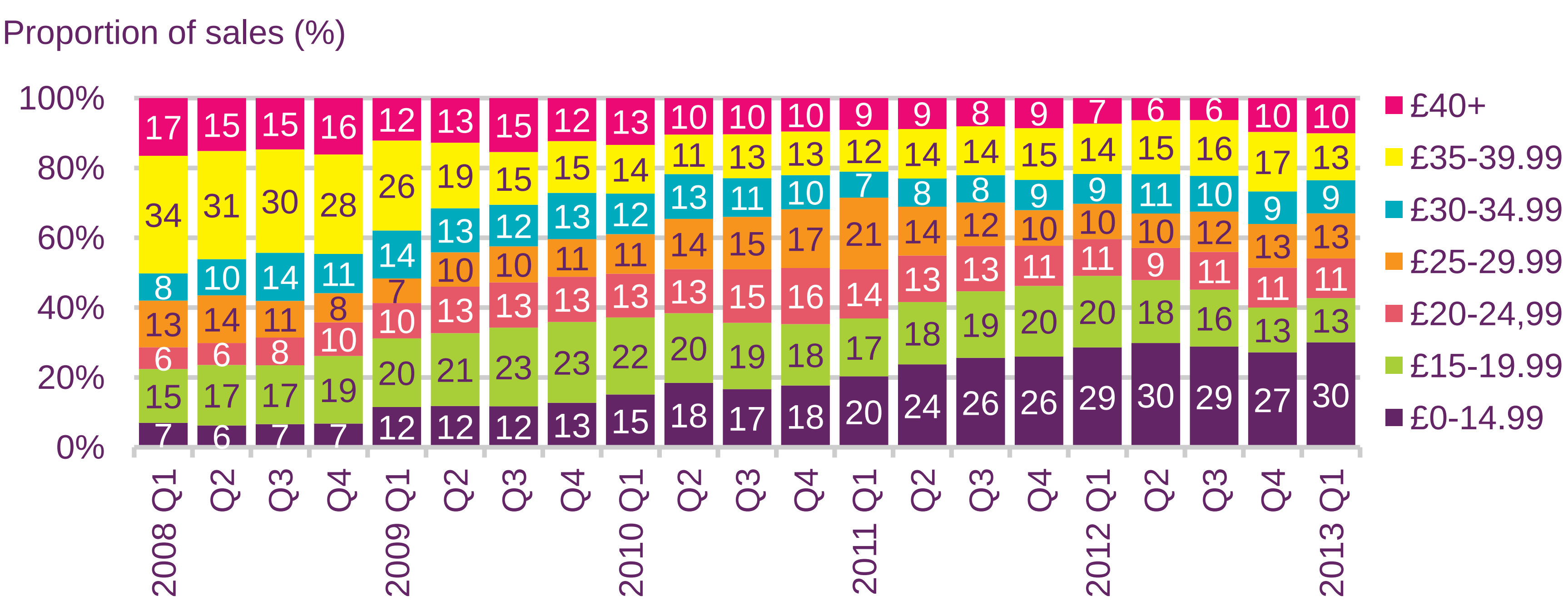
Average per-minute mobile call charges, by customer type



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

Figure 5.73

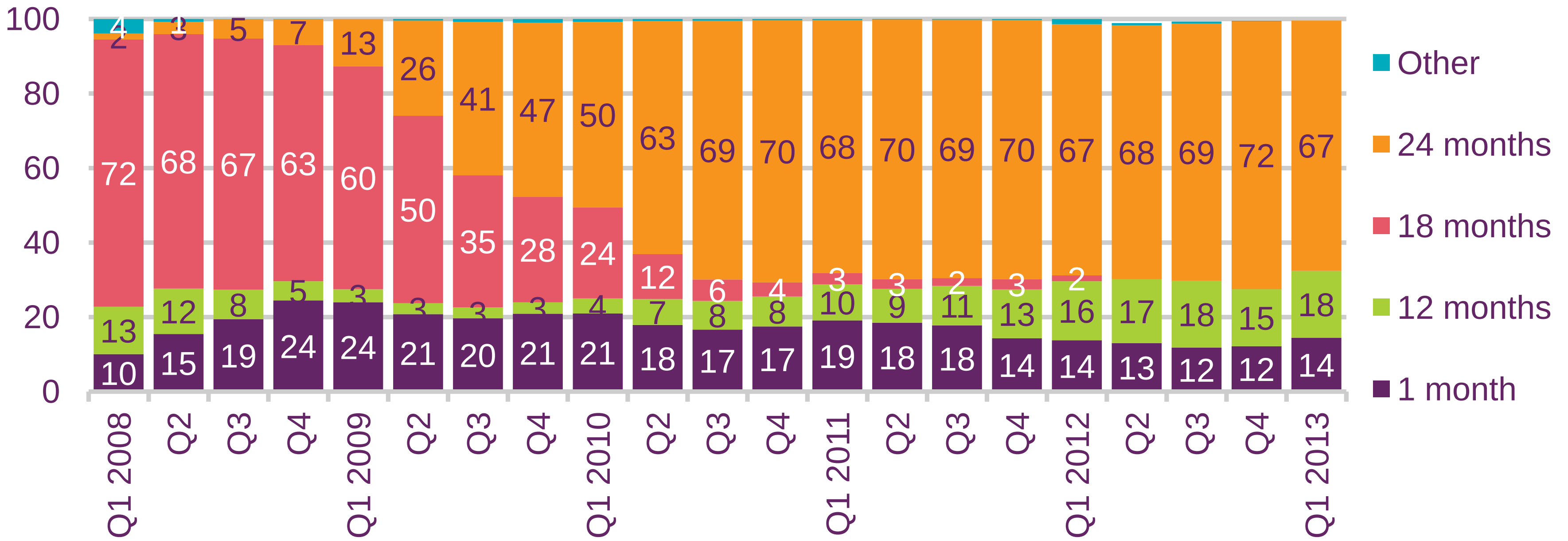
Monthly line rental prices for new post-pay mobile connections



Source: GfK Retail and Technology UK Ltd, Contract Handset Acquisitions: price segments.
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 5.74

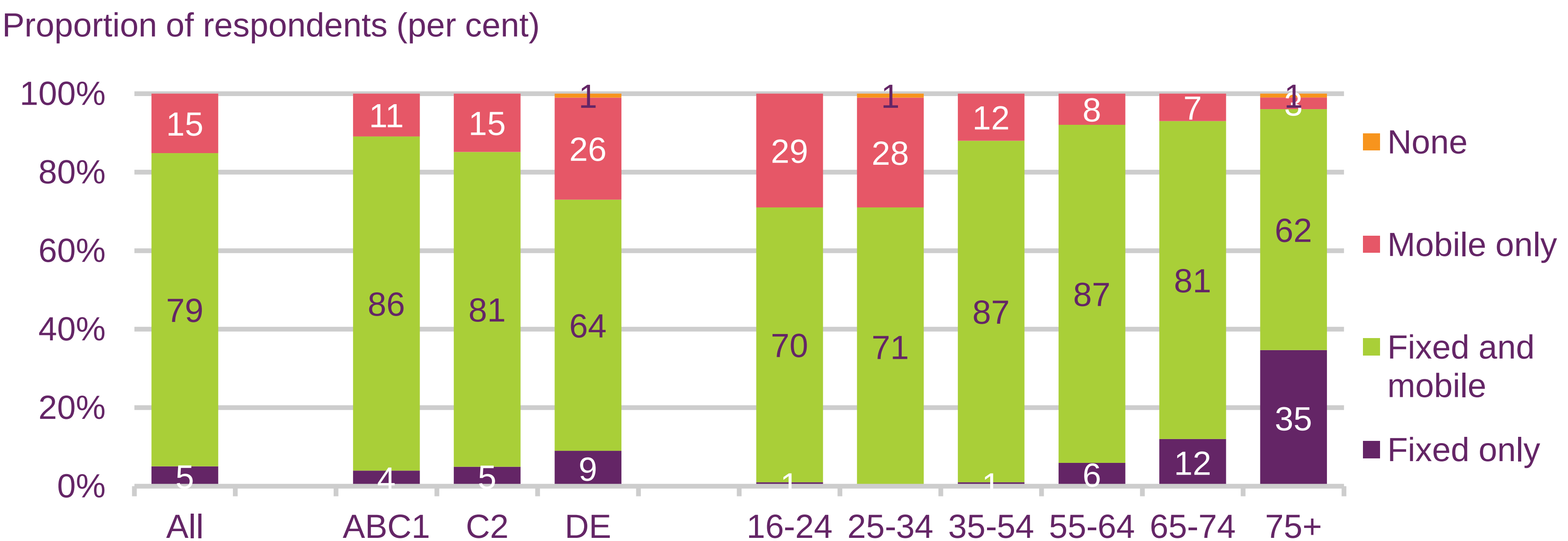
Contract lengths for new post-pay mobile connections



Source: GfK Retail and Technology UK Ltd, Contract Length Sales of new Mobile Connections
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 5.75

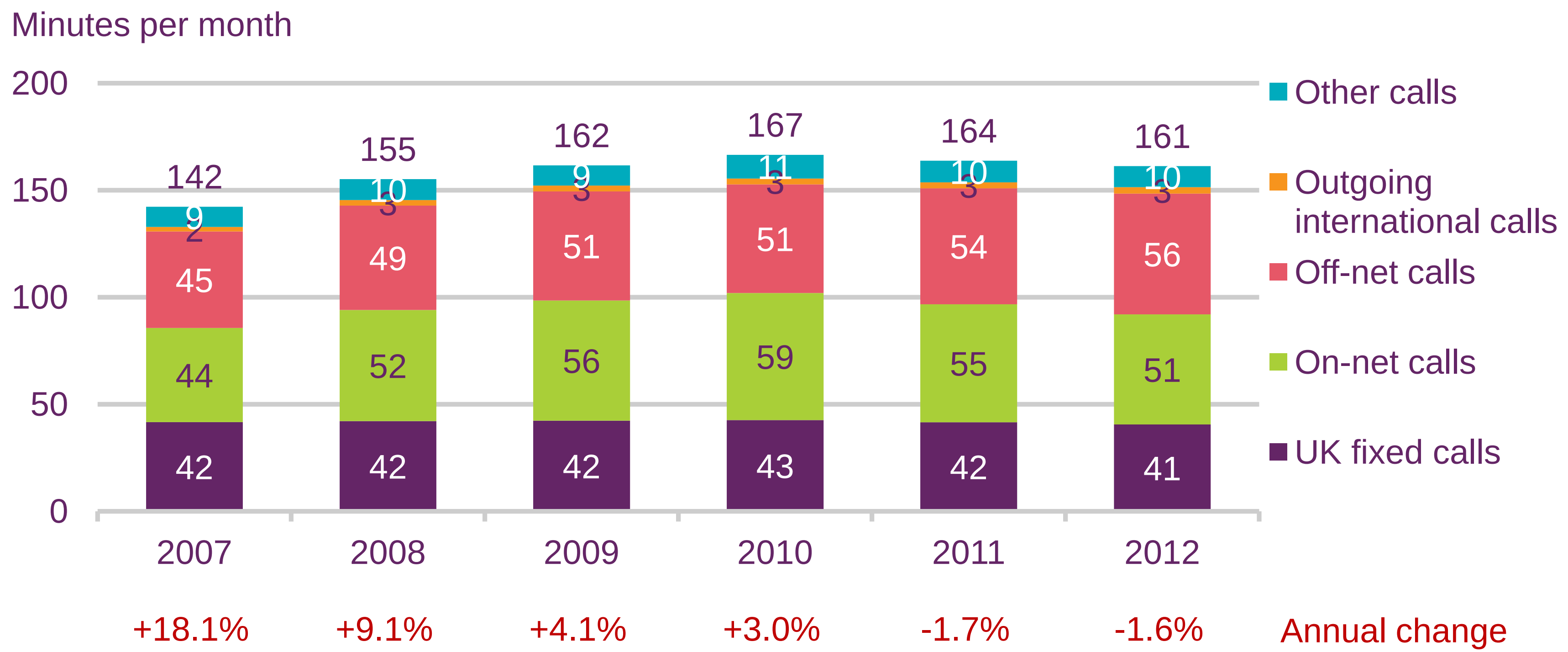
Household penetration of fixed and mobile telephony, by socio-economic group and age



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+

Figure 5.76

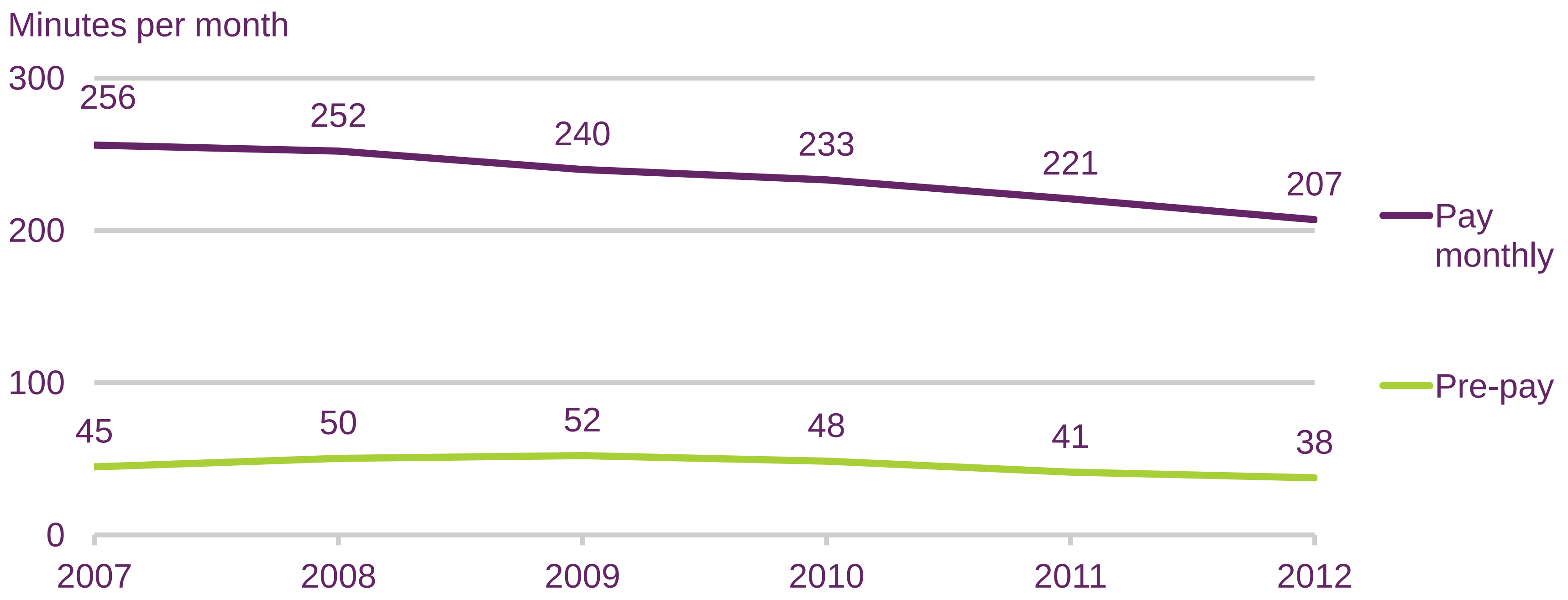
Average monthly outbound mobile voice minutes per person



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

Figure 5.77

Average monthly outbound mobile call minutes, by subscription type



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

Mobile data services

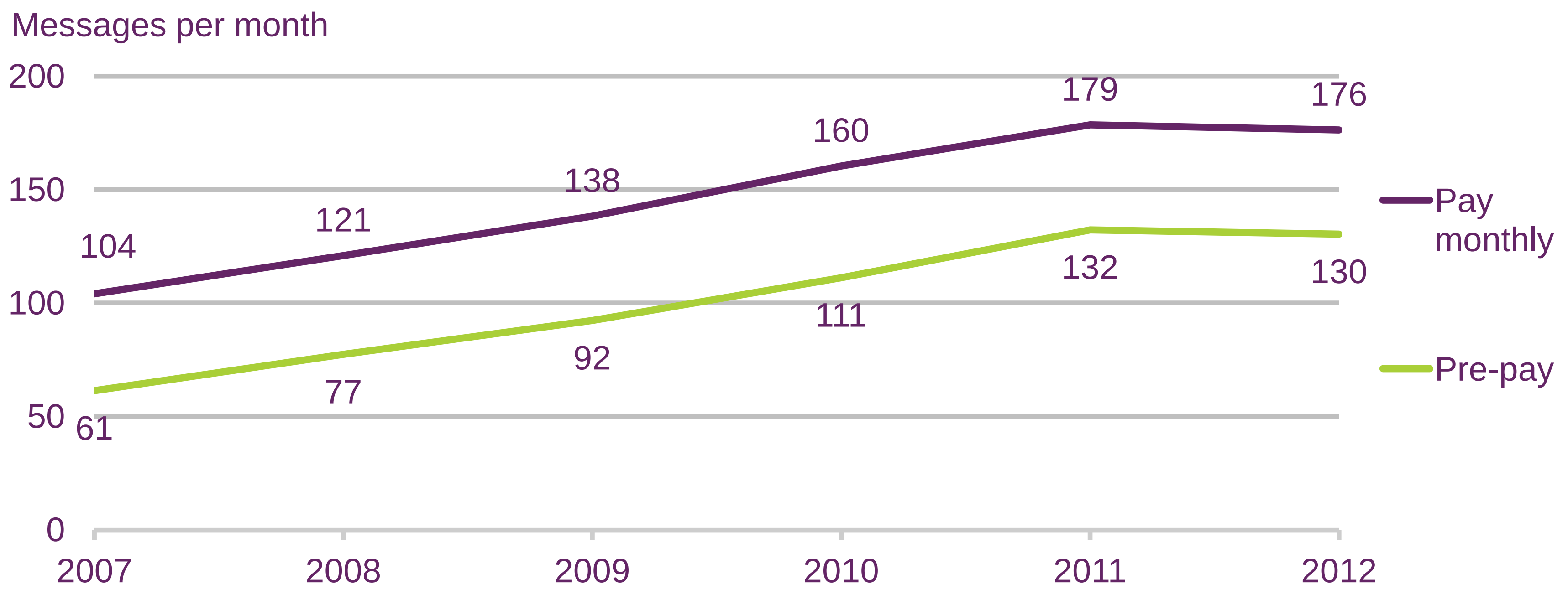
Figure 5.78

Average monthly mobile messaging volumes per person

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

Figure 5.79

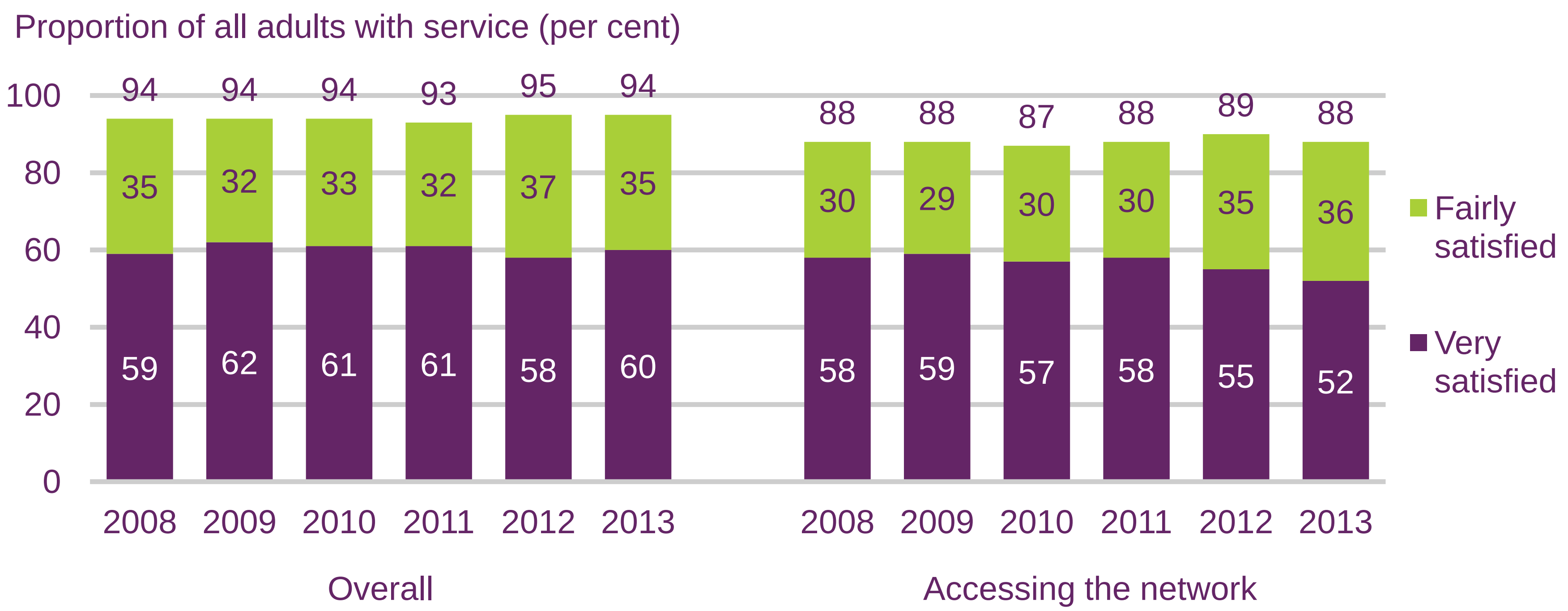
Average monthly messaging volumes by subscription type



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

Figure 5.80

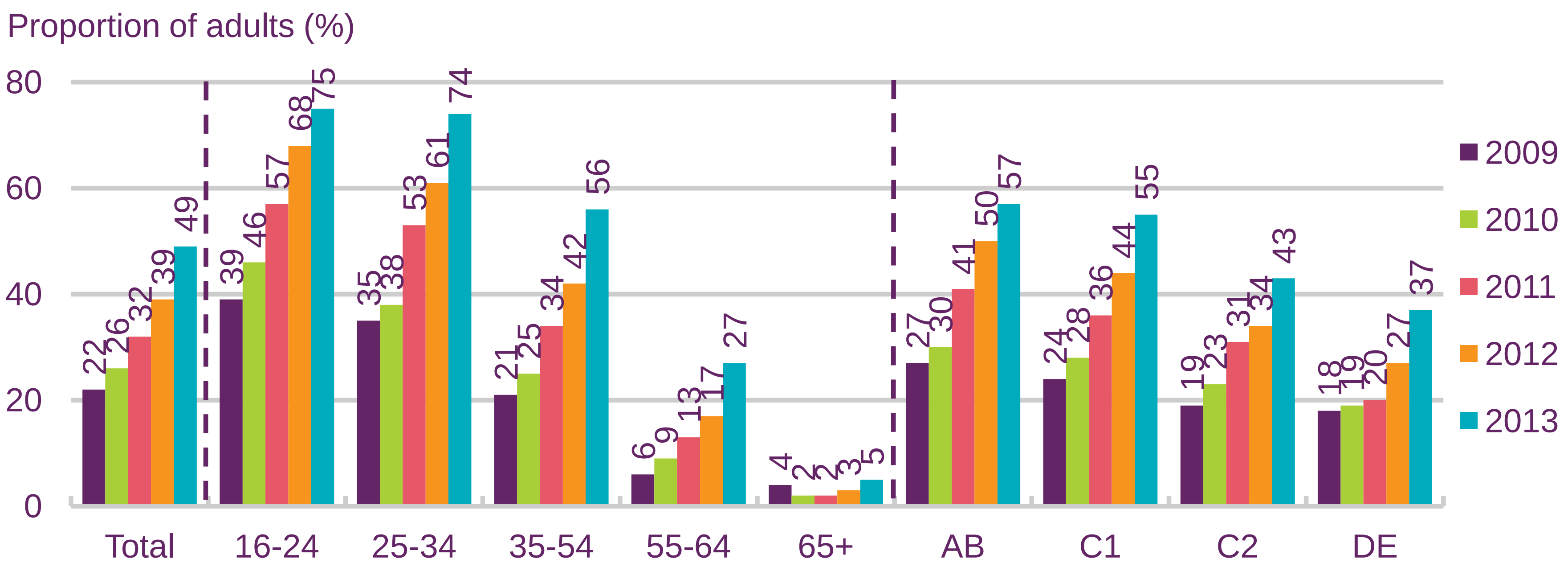
Satisfaction with aspects of mobile service



Source: Ofcom research
Base: All adults aged 16+ with a mobile phone
Note: Includes only those who expressed an opinion

Figure 5.81

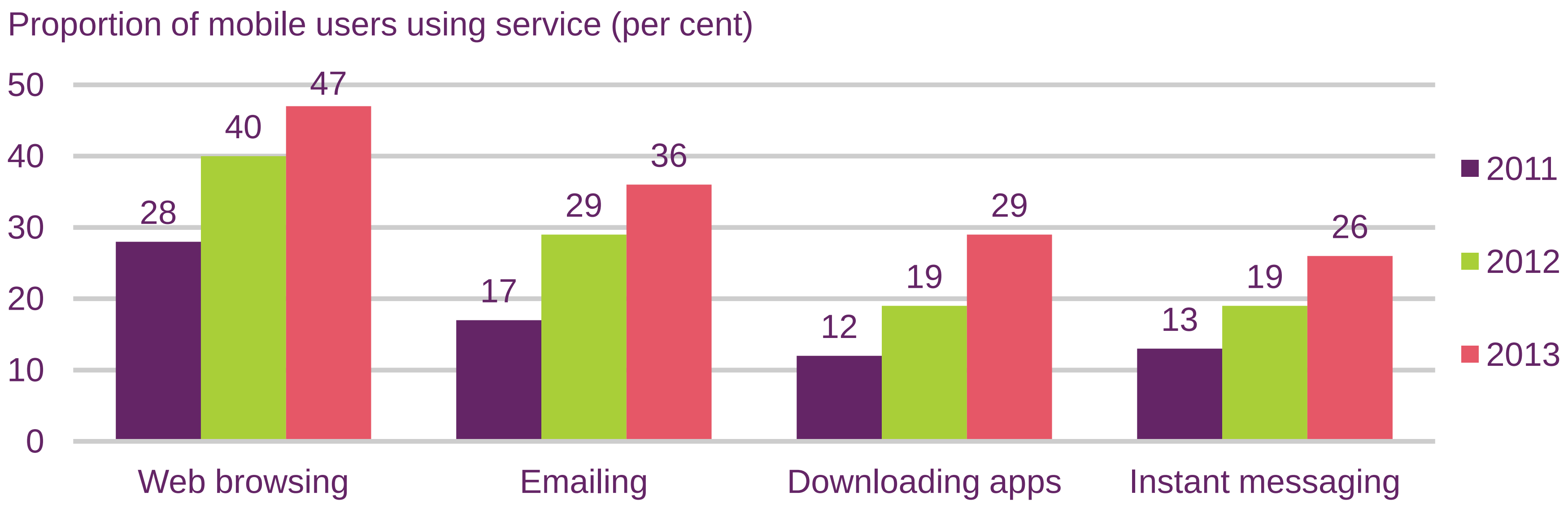
Use of data services on mobile phones, by age and socio-economic group



Source: Ofcom research, data as at Q1 of each year
Base: All adults 16+
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 5.82

Use of mobile data services among mobile users

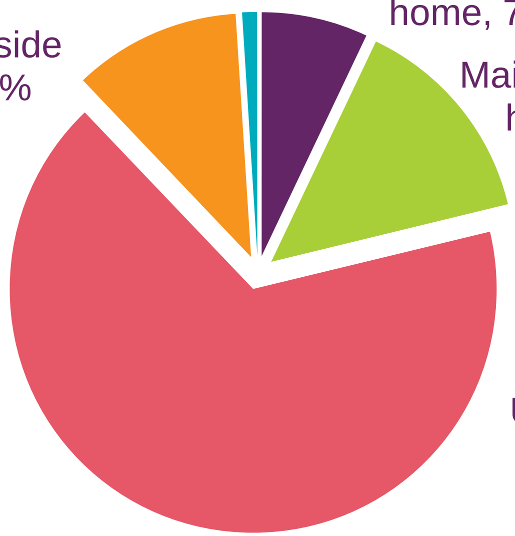


Source: Ofcom research, data as at Q1 of each year
Base: All mobile users aged 16+
QD9A: Which if any of the following activities, other than making and receiving voice calls, do you use your mobile for?

Figure 5.83

Location of internet access using a mobile handset

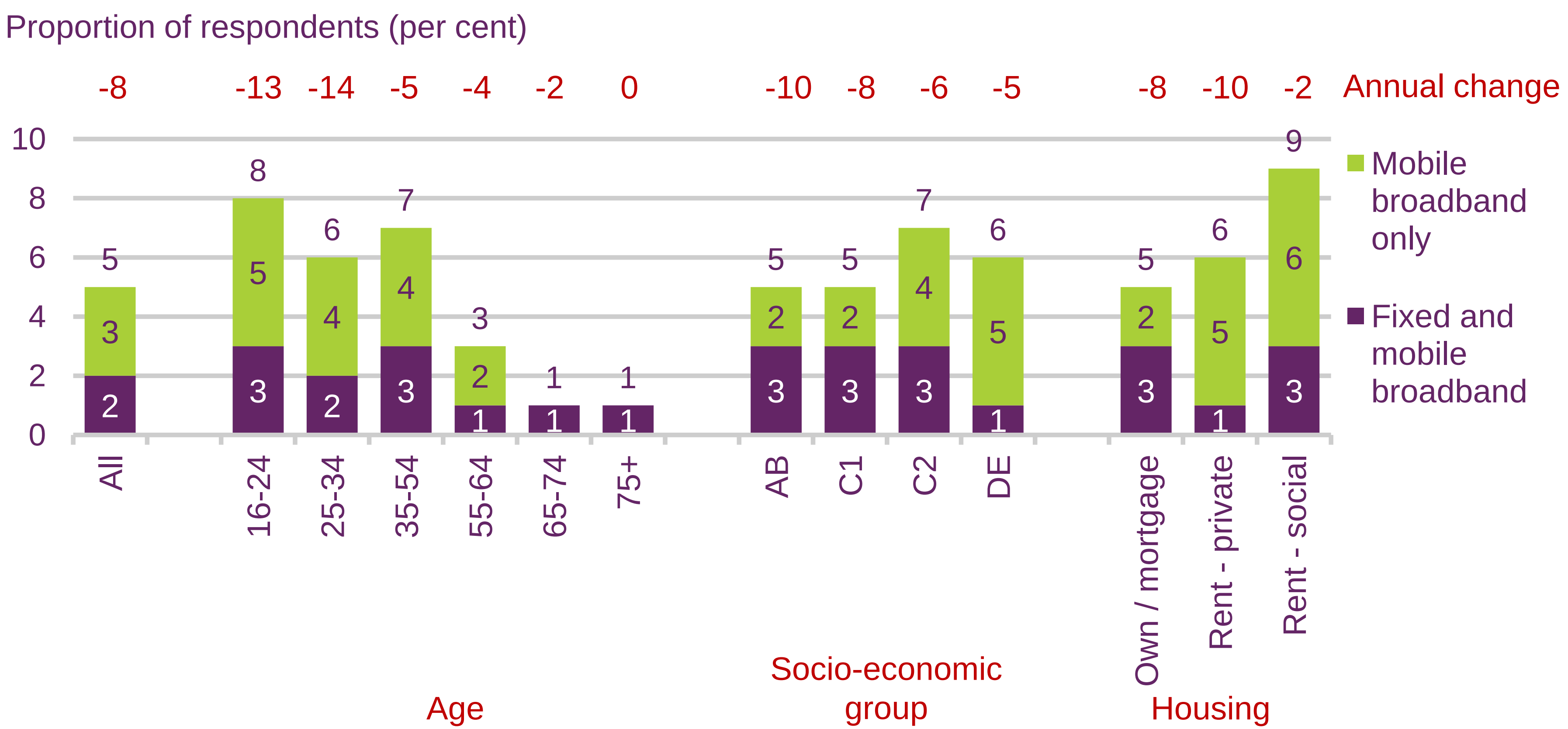
Proportion of mobile data users



Source: Ofcom research, Q1 2013
Base: All adults aged 16+ who access the internet on their mobile phone

Figure 5.84

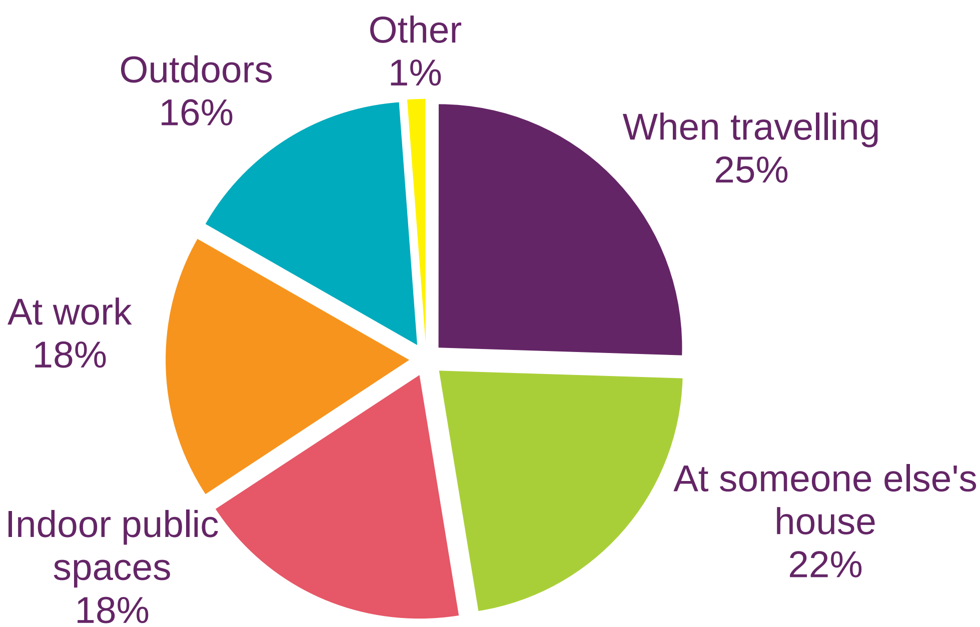
Take-up of mobile broadband: by age, socio-economic group and housing type



Source: Ofcom research, data as at Q1 2013
Base: All adults aged 16+

Figure 5.85

Location of mobile broadband use outside the home



Source: Ofcom research, data as at Q1 2013
Base: All adults aged 16+ who use mobile broadband outside the home

Figure 5.86 Lowest cost standalone mobile broadband contracts by provider

Provider		Monthly charge	Data allowance	Minimum contract length	Charges above allowance	WiFi hotspot use
Vodafone	2011	£7.50	500MB	1 month	£15/GB	1GB
	2012	£3.00	250MB	1 month	£2/250MB/day	Not included
	2013	£3.00	250MB	1 month	£2/250MB/day	Not included
O2	2011	£5.11	500MB	1 month	2.4p/MB	Unlimited
	2012	£10.21	1GB	1 month	£5.11/500MB or £10.21/GB	Unlimited
	2013	£10.21	1GB	1 month	£5.11/500MB or £10.21/GB	Unlimited
T-Mobile	2011	£10.00	1GB fair use	18 months	n/a	Not included
	2012	£10.00	1GB fair use	18 months	n/a	Not included
	2013	£7.50	1GB fair use	1 month	£3/day	3GB fair use
Orange	2011	£10.00	500MB	1 month	5.1p/MB	Not included
	2012	£10.00	500MB	1 month	5.1p/MB	Not included
	2013	£10.00	500MB	1 month	£3/day	Not included
3UK	2011	£7.89	1GB	18 months	10p/MB	Not included
	2012	£7.87	1GB	18 months	10.2p/MB	Not included
	2013	£7.87	1GB	24 months	10.2p/MB	Not included
4GEE	2013	£12.99	1GB	24 months	£6/500MB or £15/2GB	3GB fair use
Virgin Mobile	2011	£10.21	1GB	2 months	1.46p/MB	Not included
	2012	£10.21	1GB	2 months	1.46p/MB	Not included
	2013	£10.21	1GB	2 months	1.46p/MB	Not included

Source: Pure Pricing UK Broadband Pricing Briefings
Note: Data as at March of each year