

Bundled Communications Services - UK - January 2015

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“Fixed-line telephony and broadband providers have been diversifying into TV. Meanwhile, mobile network operators see users moving away from mobile voice and SMS and towards data-driven communication services. This presents a problem for them, but is a possible opportunity for bundled comms operators.”

– Samuel Gee, Senior Technology and Media Analyst

This report looks at the following areas:

- Increase in use of data-driven service represents an opportunity for fixed-line operators
- Free data might boost older use of superfast

The market for communications services has shifted to a more level playing field, with each of the big four fixed-line telco firms – TalkTalk, Sky, Virgin and BT – now offering each of the three main services: TV, fixed-line telephony and fixed-line internet. Heritage specialities – like Sky’s focus on TV or TalkTalk’s persistently low-cost broadband – mean that their brands remain distinct, but as each tries to push consumers into the triple-play bundle, these differences risk becoming overshadowed by a standardised offering.

This report looks at the current sale of and interest in bundled communication services, including the types of bundles consumers currently take, who they have them with, how much they pay for them per month, the motivations behind their most recent choice of provider, and which optional free extras might convince them to choose one bundle over another.

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