

## Mobile Network Providers - UK - March 2013

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*"Operators that focus on having a suite of cross-platform products that allow consumers to make calls and texts from any connected device will present themselves as a more attractive proposition in an ecosystem becoming dominated by consumers with a number of different devices."*

– Samuel Gee, technology analyst

### In this report we answer the key questions:

- How should operators approach the fall in voice call volumes?
- How important are smartphones to operator offerings?
- What are the prospects for 4G take-up?
- What can be done to address a market more dependent on data services?

The mobile phone market is in a unique position, with the fundamental technology underpinning it well established – having surpassed fixed-line telecoms many years ago – but facing upheaval itself from newer competitors. Since the introduction and popularisation of smartphones in the years leading to 2012, data delivery has become an increasingly important part of the mobile proposition, and this is slowly but steadily starting to change the ways consumers interact with the market.

This report will examine the split of consumers onto pay-as-you-go and contract connections, when consumers last changed their provider, what provoked consumers to last change their provider, what would incentivise them to change their provider next time round and consumer attitudes towards the 4G network.

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