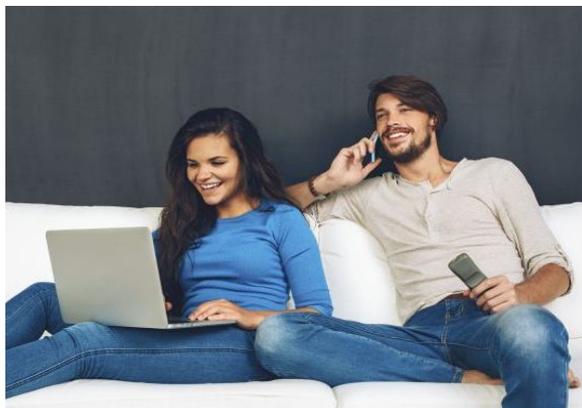


## Bundled Communications Services - UK - March 2016

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“By the end of 2016 each of the big four providers are expected to offer some form of quad-play bundle. The success of quad-play lies in convincing customers that having all of their services under one roof will be beneficial. Using customer data to create personalised deals and bundles could be the key to achieving this.”  
 – Rebecca McGrath, Media Analyst

### This report looks at the following areas:

- Exclusive TV content is vital
- Providers push quad-play with their own mobile service

The issues that face home TV, internet, phone, and security services are daunting. Pay TV service is on the decline with 25-34s, who are the least likely to subscribe, a trend indicative of the desirability of internet delivery of video in lieu of linear channels. Phone subscriptions declined 25% from 2010-15, as unlimited voice service approached universality among both prepaid and postpaid mobile phone service. Home security services are now challenged by the increasing ease of installing and monitoring cameras. As a result, internet service has been the focus of growth for the industry as a whole, and providers are capitalizing upon it by building out 1-gig (1 gigabit) service.

In the context of this rapidly changing environment, Mintel explores attitudes to internet service inclusive of interest in receiving the highest speeds of service, willingness to pay for them, and the entertainment habits that make them necessary. This Report also explores interest in changing service for internet, video, and phone service, as well as opportunities in forming new bundles of service with home security and cross-selling home services with wireless services.

This Report builds on analysis presented in Mintel's *Pay TV and Home Communications – US, March 2015* and *Pay TV and Home Communications – US, October 2014* and *Pay TV and Home Communications – US, October 2013*.

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### DID YOU KNOW?

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Sky Q launches

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Most people still have a landline connection

Nearly half have superfast/fibre internet

Younger people more likely to have a quad-play bundle

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