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Mobile Network Operator's Trends in Europe

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Abstracts

About this report

The Mobile Network Operator Trends report (78 pages in total) is published every six months and the latest edition covers the period June 2011 to December 2011.

The report also provides a year-on-year comparison of:

Subscriber numbers, breakdown of subscriber numbers and market share

Blended monthly ARPU

Blended annualised churn

PLUS comments on each of the markets and provides an inside into the latest pricing trends.

Coverage

The report covers the main MNOs in eight key European countries namely France, Germany, Italy, Netherlands, Spain, Sweden, Switzerland and the UK.

Figure 1: Table of the 29 MNOs that are included in this survey
France Germany Italy Netherlands Spain Sweden Switzerland UK Orange Telekom TIM KPN Movistar Telia
Sonera Swisscom O2 SFR Vodafone Vodafone T-Mobile Vodafone Tele2 Orange Everything Everywhere Bouygues E Plus Wind Vodafone Orange Telenor Sunrise H3G O2 H3G Yoigo H3G Vodafone

Extract from the Report: Country Analysis – end of December 2011

In all of the eight countries in this survey, MNO mobile penetration rates (excluding the MVNO segment) are typically over 100 per cent (with the exception of France and the Netherlands in the TCL survey) which indicates that all 8 mobile markets are relatively mature. (It should be noted that the Dutch market has a developed MVNO sector which accounts for around 20 per cent of all mobile subscribers). Sweden has the highest MNO penetration rate in the survey of 157 per cent followed by Italy with 147 per cent.

Subscriber numbers for 25 out of the 29 MNOs in our 8 country survey continued to grow over the 12 month period to the end of December 2011. But some 5 MNOs – including Vodafone (Italy), Everything Everywhere (UK), KPN (Netherlands), Movistar (Spain) & Telefonica O2 (UK) saw falls in subscriber numbers year on year. The declines have been mainly due to a policy of managing out dormant or so-called low value Pre Pay accounts by the MNO in favour of Pay Monthly subscribers, which has led to a fall in overall subscriber numbers for selected operators.

Blended ARPU levels across the 28 MNOs highlighted in the survey (excluding the Spanish operator Yoigo) have declined slightly by the end of December 2011 to an average of 24.06 Euro per month (from 25.53 Euro per month at the end of 2010) – a decline of over 1.4 Euro per month during 2011.

MNOs are reporting a continued increase in overall mobile subscriber numbers, which across the 8 European markets now has increased to over 432 million as of the end of December 2011 – up from 423.5 million (as of the end of 2010). This represents year on year growth of 7.9 million MNO subscribers year on year – representing a year on year increase of just over 2 per cent in new MNO subscribers over the year.

In the table over the page, TCL show the mobile penetration in the 8 countries in our survey over the 3 year period from the end of 2008 to the end of December 2011.

We provide details of the mobile penetration rates in the 8 countries below – this time as of the end of December 2011 - as a bar chart on the next page. Figure 3: Chart of MNO Mobile Penetration rates at the end of December 2011 (in per cent)

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A LIST OF FIGURES USED IN THE SURVEY

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