

Sky Mobile Launch

December 2016

INTRODUCTION

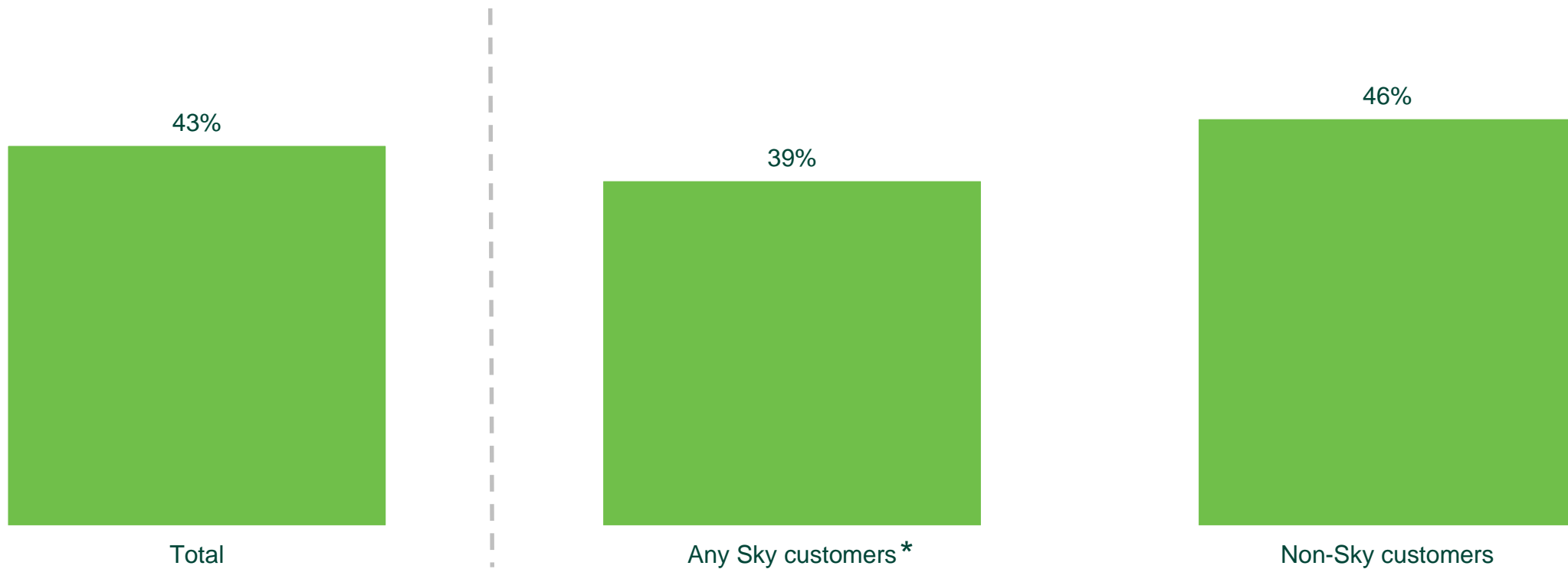
- On 29 November, Sky officially announced the launch of its mobile network, Sky Mobile, becoming a "quad play" provider, offering broadband, television, fixed-line telephone and a mobile service.
- Sky emphasised its distinctive mobile market proposition based on:
 - The ability to roll over unused data and to stockpile it in a 'piggybank' for up to three years. Other providers offer a data rollover service currently but they only allow customers to roll over data from last month to the current month
 - Flexible monthly plans, offering customers the ability to change their plan every month, depending on how much data they need. They will also be able to add unlimited data, texts and minutes with an add-on for £10 per month
 - Exclusive benefits for Sky TV customers, who will be able to subscribe to the network starting from mid-December – while other customers will have to wait until the new year- and to access special offers, such as unlimited texts and calls for free.
- Between 30 November and 1 December, Harris Interactive conducted a **Harris24** poll to measure awareness of Sky Mobile and also gauge consumer interest.

SUMMARY

- 4 in 10 UK mobile users were aware of the new network
 - Non-Sky customers were substantially more aware than current Sky customers, which comes as a surprise considering that the ongoing Sky Mobile marketing campaign aims at building its market share starting from existing customers;
 - Levels of awareness were highest among people aged 55+ (60%), although younger mobile users express higher consideration and interest.
- A majority said they were unlikely to choose Sky Mobile as a network provider. However, consideration of the new MVNO rises from 23% to 37% and to 35% when highlighting respectively the data roll-over service and flexible monthly plans.
- Both data roll-over and flexible monthly plans polarise consumer reactions, with 40% stating an interest in these services and an equal proportion claiming the opposite. These services appeal more to women, younger consumers, Sky customers, and mobile users on 3 and EE.

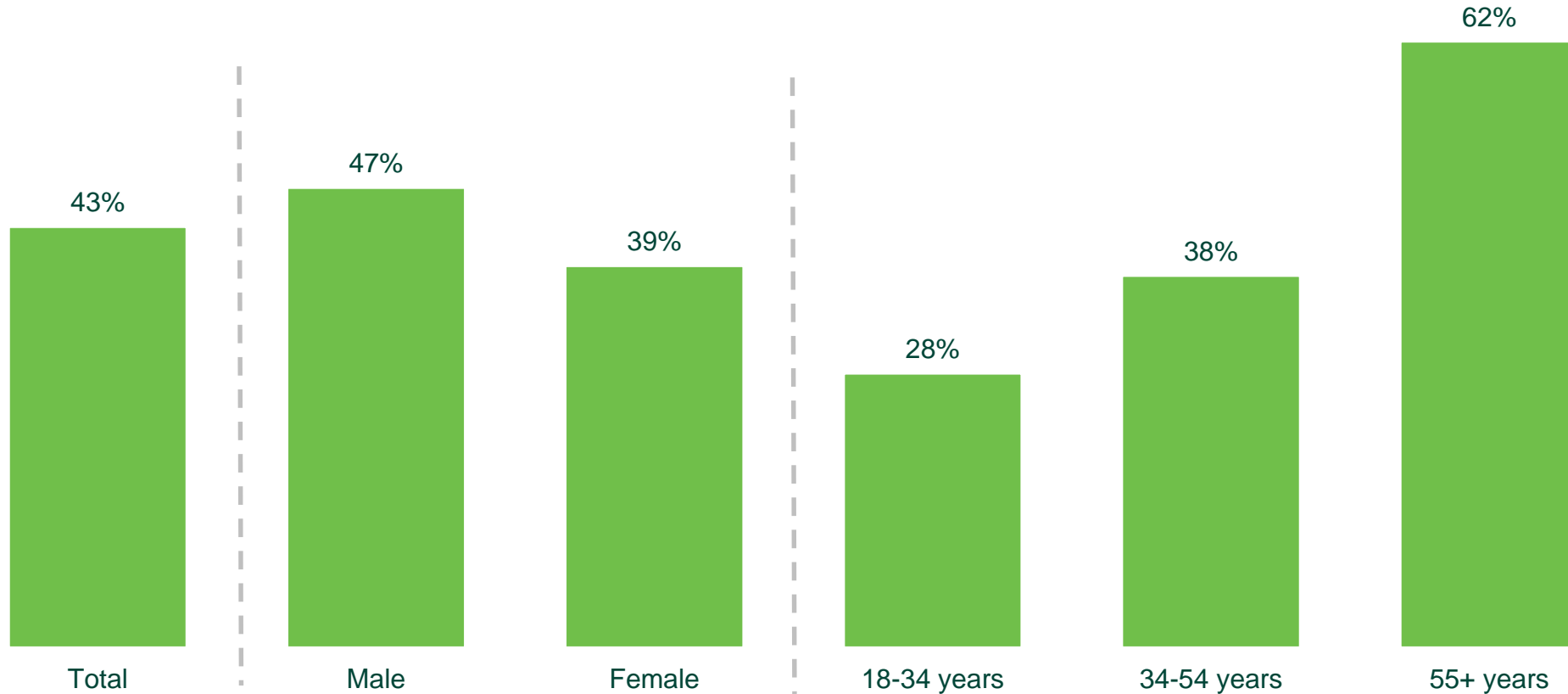
Awareness of Sky Mobile

More than 4 in 10 are already aware of the new Sky mobile services. Surprisingly, we see higher levels of awareness among non-Sky customers.



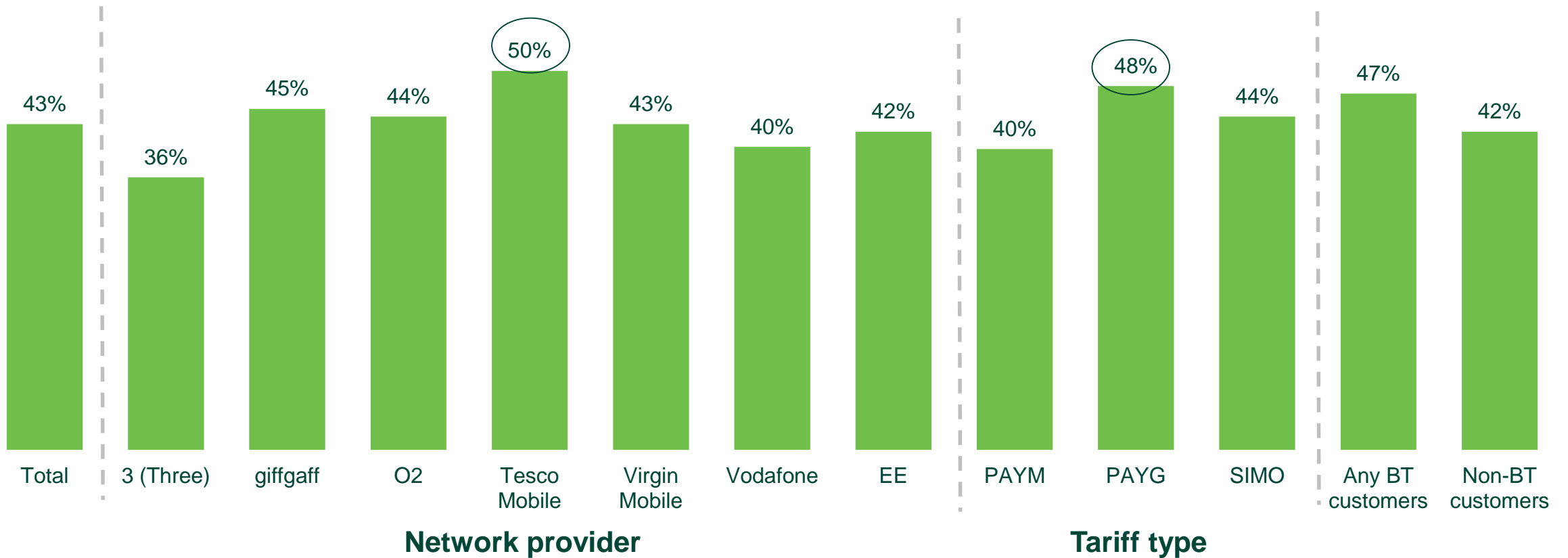
Awareness of Sky Mobile

More than 4 in 10 are already aware of the new Sky Mobile service. Levels of awareness increase with age and males are more likely than women to know Sky Mobile.



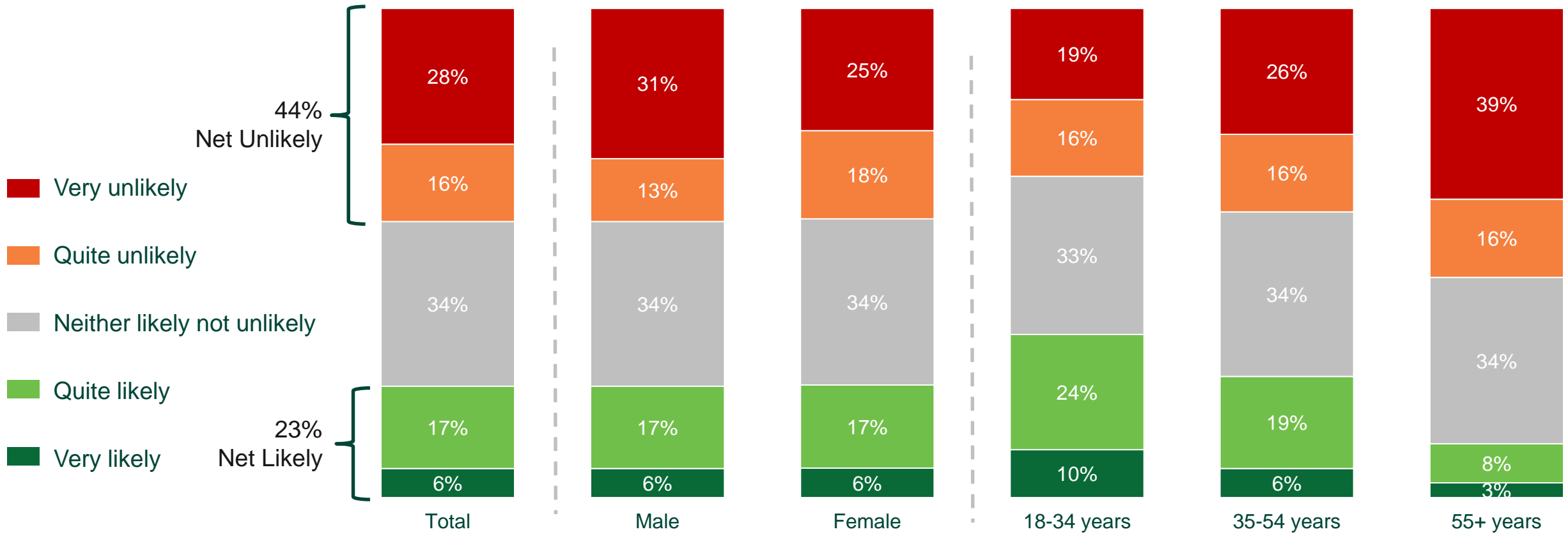
Awareness of Sky Mobile

Tesco Mobile customers and those on PAYG are more likely to be aware of the new MVNO.



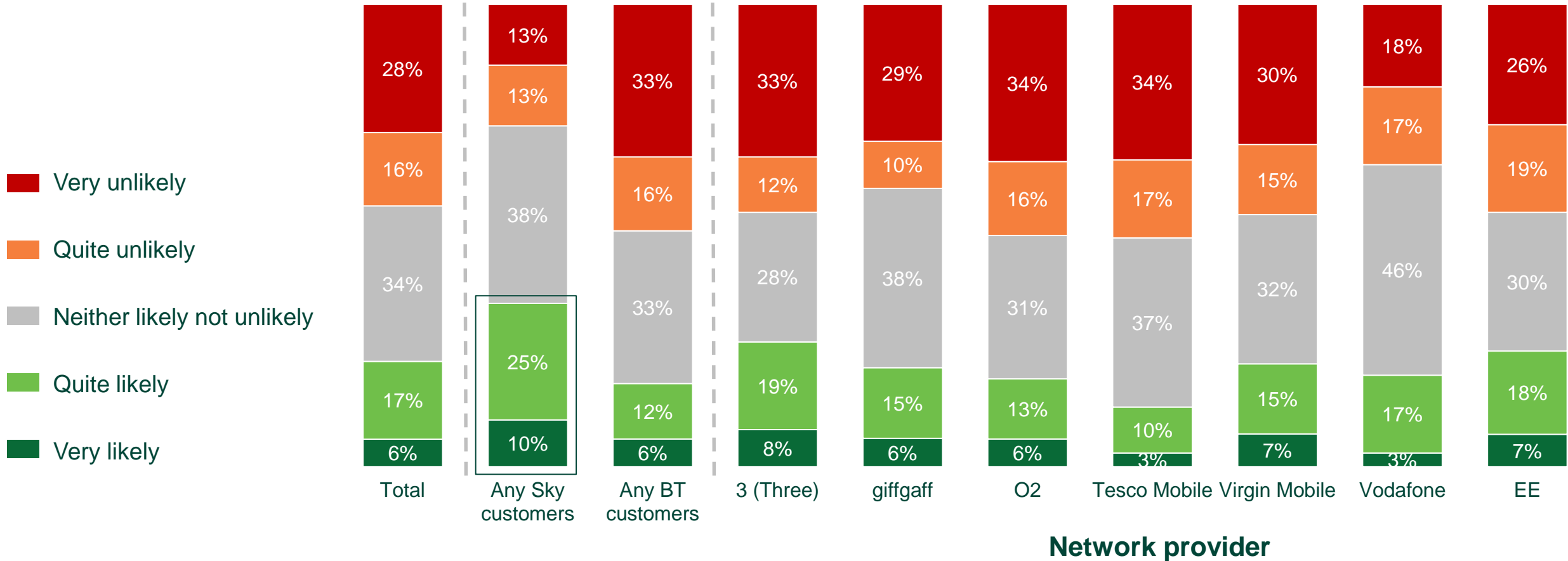
Likelihood to choose Sky Mobile

Consideration is low, with below 1 in 5 likely to choose Sky Mobile and more than 4 in 10 unlikely to do so. Consideration decreases with age.



Likelihood to choose Sky Mobile

Likelihood to choose Sky Mobile is highest among Sky customers and higher than average among mobile users on 3

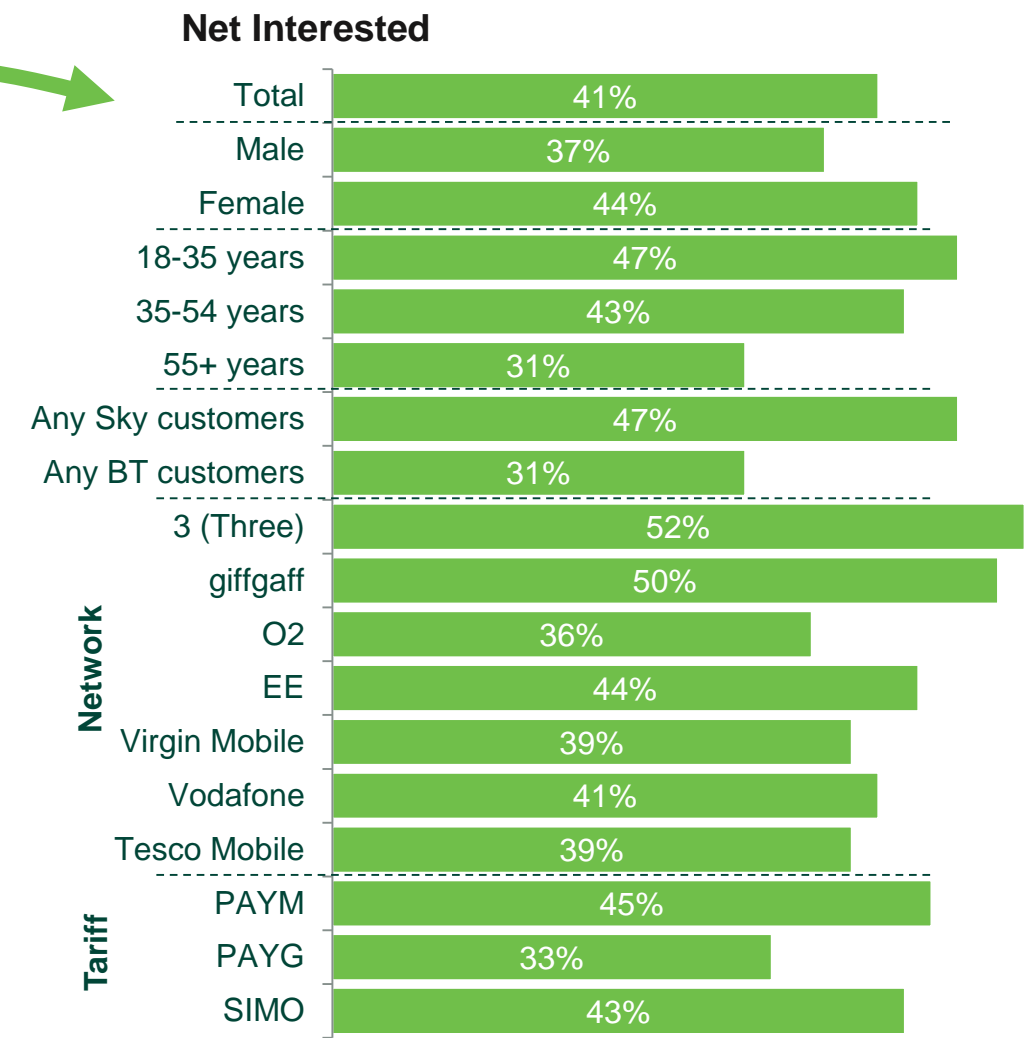
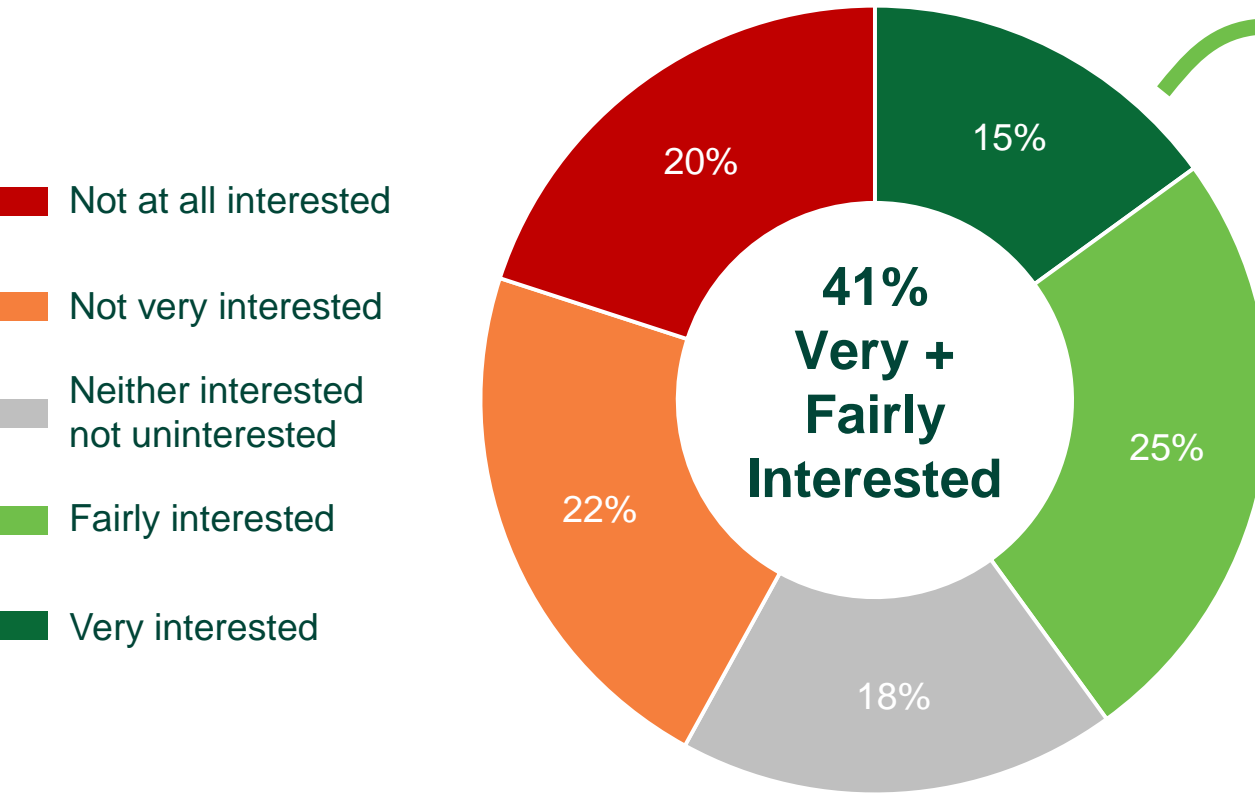


Q7 Sky has recently announced that it is launching its own mobile phone service. How likely are you to choose Sky Mobile as a network provider at the end of your contract or simply in the future if you are on Pay as you go?

Base: All respondents (n=1,075); Any Sky customers (n=460); Any BT customers (n=251); Tesco Mobile (n=101); O2 (n=218); giffgaff (n=45); EE (n=276); Virgin Mobile (n=93); Vodafone (n=155); 3 (Three) (n=109)

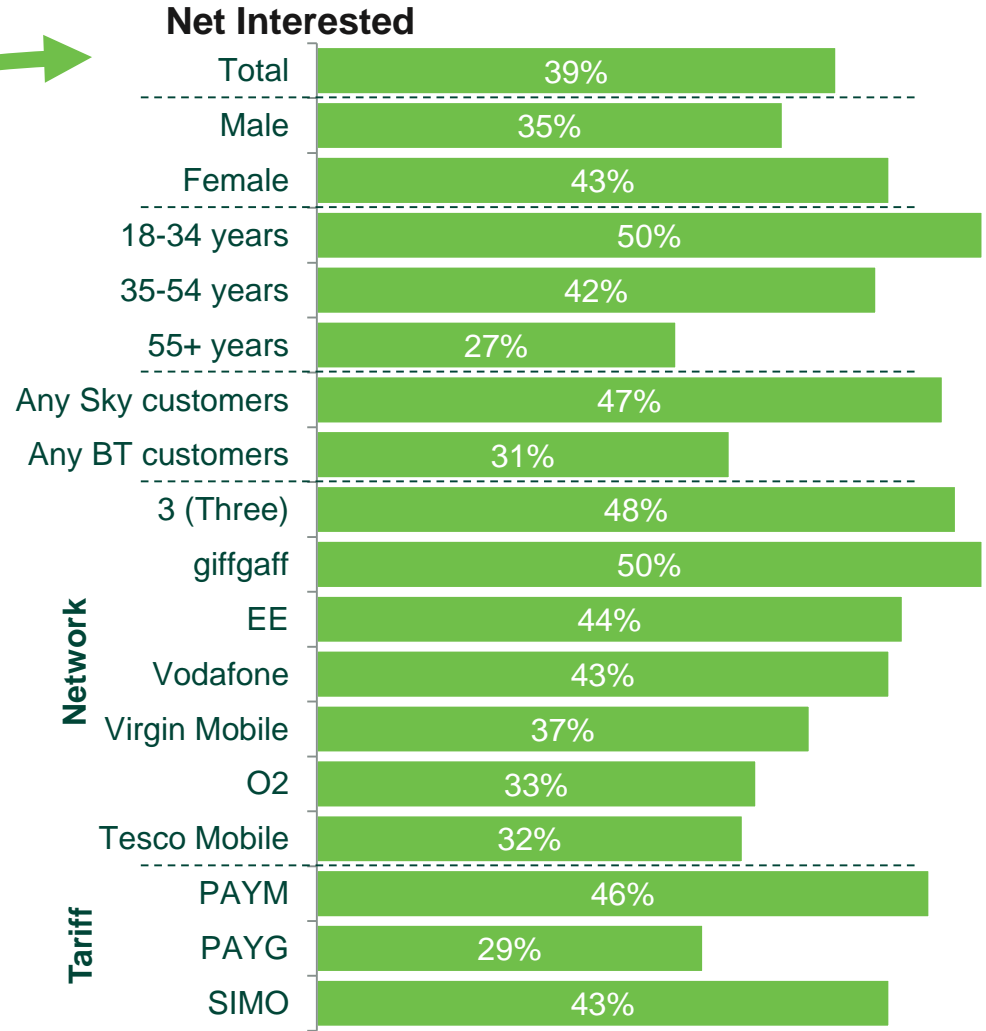
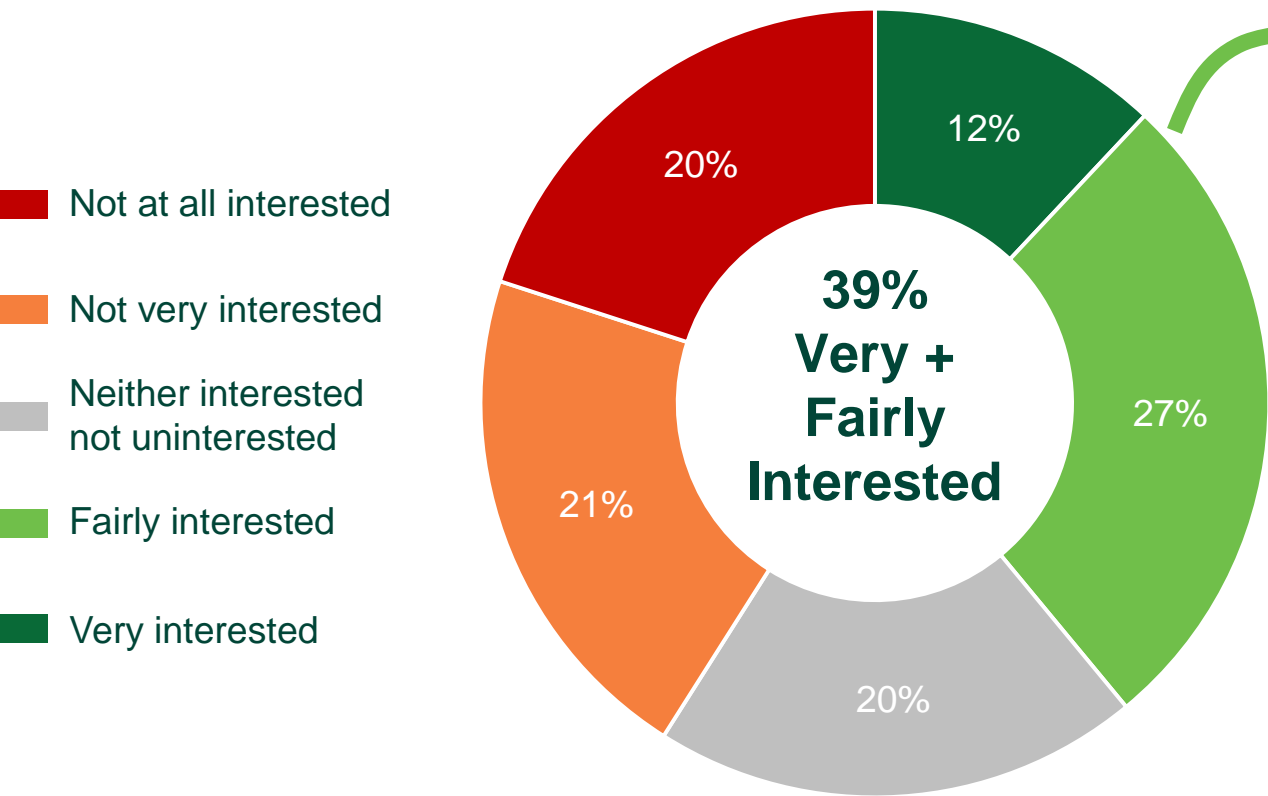
Interest in data roll-over service

Reactions to data roll-over are polarised, with 4 in 10 expressing interest and an equal proportion stating the opposite. The service appeal more to women, younger consumers, Sky customers and mobile users on 3 and EE.



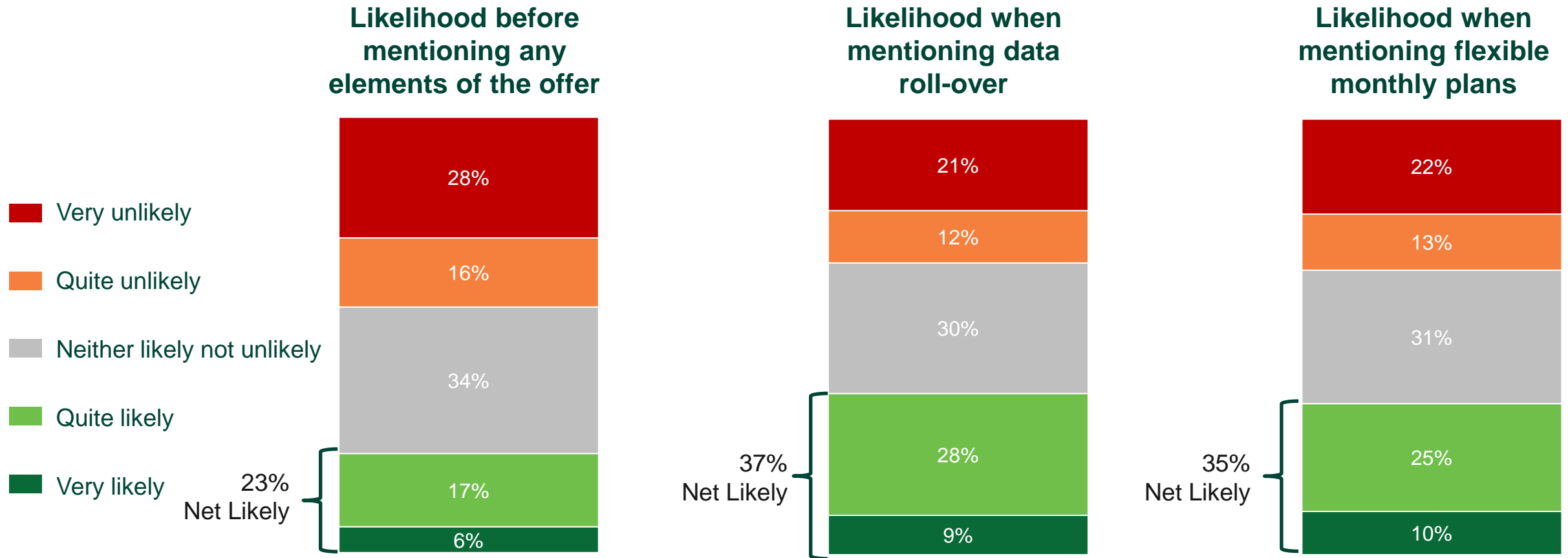
Interest in flexible monthly plans

Very similar response on interest in flexible monthly plans, where we see an equal split between interested and not interested, and a skew to females, younger mobile users, Sky customers and mobile users on 3 and EE.



Likelihood to choose Sky Mobile

When mentioning data roll-over and flexibility, the likelihood to choose Sky Mobile increases significantly.



METHOD AND CONTACT DETAILS

- We surveyed c1,000 UK mobile users between 31 November and 1 December.
- Data was weighted to be representative of the UK population in respect of gender, age and region.
- Harris24 is especially useful for those occasions when you need answers fast from the general population. Covering 30 countries, 1000 –2000 interviews can be completed and reported in less than 24 hours in the UK, US, France, Germany, Spain and Italy.
- For further information about Harris24 please contact the author of this report:

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