Telecommunications market data tables
Q1 2009

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1. Market monitor

In this section we highlight some of the key trends emerging this quarter from the data we collect on the UK telecommunications sector.

Fixed

- Total fixed line revenues fell by 4.4% year-on-year to £2.2bn in Q1 2009, with call revenues falling by 7.6% and rental revenues by 1.5%.
- Fixed voice call volumes (excluding NTS calls) fell by 7.5% year-on-year to 34.9 billion minutes in Q1 2009.
- This was driven by a 9.2% fall in the volume of calls to mobile numbers. Calls to UK geographic numbers increased by 1.2% between Q1 2008 and Q1 2009.

Internet

- The number of UK residential and small business broadband connections increased by 281k (1.6%) to 17.6 million during the quarter (up 8.4% year-on-year), with the majority of this growth being as a result of increasing numbers of LLU-based connections.
- There was little change in BT's retail broadband market share which fell from 26.5% at the end of March 2008 to 26.4% at the end of March 2009.

Mobile[1]

- Total revenue across the UK's four largest mobile operators fell by 3.7% between Q1 2008 and Q1 2009.
- Total call volumes across the four operators increased by 6.8% year-on-year to 25.7 billion minutes in Q1 2009, driven by a 7.1% increase in calls volumes to UK numbers and a 9.0% rise in international call volumes. Roaming call volumes were 13.6% lower than in Q1 2008.
- Messaging volumes increased by 26.1% between Q1 2008 and Q1 2009; however, quarter-on-quarter growth slowed to 4% in Q1 2009 compared to 11% in Q4 2008. On average, subscribers among the four largest mobile operators sent nearly 104 messages per month in Q1 2009 compared to 84 in Q1 2008.
- The number of subscribers declined by 1% in Q1 2009 compared to the previous quarter but was 1% higher than Q1 2008. Post-pay subscribers accounted for 38% of total subscribers in Q1 2009, compared to 36% in Q1 2008.

[1] The commentary provided only refers to the four mobile operators covered in this report.

2. Fixed telecoms market data tables

2009 Q1 (January to March 2009)

Table

Notes:

Please note this update is based on calendar quarters:

Q1: January to March

Q2: April to June

Q3: July to September

Q4: October to December

Note: The data in these tables are the most accurate currently available. Where historical restatements have occurred, this is due to either operator restatements or improvements in methodology.

Table 1

Summary of network access & call revenues by operator (£millions)

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2007	9,563	5,870	1,207	2,487	61.4%
2008	9,298	5,436	1,175	2,687	58.5%
2008 Q1	2,342	1,385	302	654	59.2%
2008 Q2	2,375	1,404	295	676	59.1%
2008 Q3	2,297	1,333	290	675	58.0%
2008 Q4	2,285	1,314	289	682	57.5%
2009 Q1	2,238	1,259	289	691	56.2%
Access					
2007	4,776	3,144	579	1,053	65.8%
2008	4,867	3,044	571	1,252	62.5%
2008 Q1	1,204	765	144	294	63.5%
2008 Q2	1,233	784	142	308	63.6%
2008 Q3	1,215	755	142	318	62.2%
2008 Q4	1,215	740	143	332	60.9%
2009 Q1	1,186	717	144	325	60.5%
Calls[1]					
2007	4,787	2,726	628	1,434	56.9%
2008	4,431	2,392	604	1,435	54.0%
2008 Q1	1,138	621	158	359	54.5%
2008 Q2	1,141	620	153	368	54.3%
2008 Q3	1,082	577	148	357	53.4%
2008 Q4	1,070	575	146	350	53.7%
2009 Q1	1,052	542	144	366	51.5%

[1] Revenue figures are not intended to include subscription revenues for unmetered dial-up internet access although some element may remain.

Table 2

Summary of exchange line numbers at end of quarter by operator (000's)

	All Operators	BT	Virgin Media	Other	BT share
2007	33,290	22,245	4,524	6,520	66.8%
2008	33,048	20,567	4,605	7,877	62.2%
2008 Q1	33,168	21,775	4,528	6,865	65.7%
2008 Q2	33,110	21,396	4,537	7,177	64.6%
2008 Q3	33,074	21,035	4,552	7,487	63.6%
2008 Q4	33,048	20,567	4,605	7,877	62.2%
2009 Q1	32,938	20,007	4,606	8,325	60.7%

Table 3

Summary of call volumes by operator (millions of minutes)[1]

	All Operators	BT[1]	Virgin Media	Other Direct Access	Other Indirect Access	BT share[1]
2007	161,060	82,218	22,869	13,625	42,348	51.0%
2008	143,787	67,152	19,272	16,548	40,815	46.7%
2008 Q1	37,704	18,400	5,040	3,530	10,734	48.8%
2008 Q2	36,379	16,865	4,815	4,404	10,295	46.4%
2008 Q3	35,193	16,196	4,690	4,377	9,930	46.0%
2008 Q4	34,511	15,691	4,727	4,236	9,856	45.5%
2009 Q1	34,895	15,407	4,661	4,410	10,417	44.2%

[1] Includes calls made to non-BT internet service providers via FRIACO.

Table 4

Summary of call revenues by call type and operator (£millions)

	All Operators	BT	Virgin Media	Other	BT share
UK geographic calls					
2007	1,467	809	184	474	55.1%
2008	1,389	753	161	475	54.2%
2008 Q1	345	183	44	119	52.9%
2008 Q2	361	199	40	122	55.3%
2008 Q3	342	185	39	118	54.1%
2008 Q4	341	185	39	117	54.3%
2009 Q1	349	183	41	124	52.6%
International calls					
2007	575	279	45	252	48.4%
2008	578	252	53	273	43.6%
2008 Q1	148	66	13	68	44.8%
2008 Q2	152	67	14	71	44.4%
2008 Q3	139	59	13	67	42.5%
2008 Q4	140	60	13	67	42.6%
2009 Q1	136	57	12	67	42.0%
Calls to mobiles					
2007	1,663	803	222	638	48.3%
2008	1,565	718	220	627	45.9%
2008 Q1	405	187	58	159	46.2%
2008 Q2	403	185	57	162	45.8%
2008 Q3	387	175	54	158	45.2%
2008 Q4	370	172	51	147	46.4%
2009 Q1	371	167	49	155	45.1%
Other calls[1]					
2007	1,082	835	176	71	77.2%
2008	899	669	170	59	74.5%
2008 Q1	241	185	43	13	76.8%
2008 Q2	226	169	43	14	74.7%
2008 Q3	214	158	42	14	73.9%
2008 Q4	218	157	43	18	72.1%
2009 Q1	197	134	42	21	68.1%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types. Figures are not intended to include subscription revenues for unmetered dial-up internet access although some element may remain.

Table 5

Summary of call volumes by call type and operator (millions of minutes)

	All Operators	BT	Virgin Media	Other Direct Access	Other Indirect Access	BT share
UK geographic calls						
2007	95,821	46,133	14,434	8,433	26,821	48.1%
2008	91,344	41,345	13,732	10,513	25,754	45.3%
2008 Q1	23,660	11,009	3,644	2,199	6,808	46.5%
2008 Q2	22,980	10,324	3,400	2,834	6,423	44.9%
2008 Q3	22,302	10,014	3,288	2,752	6,249	44.9%
2008 Q4	22,401	9,998	3,400	2,728	6,274	44.6%
2009 Q1	22,905	9,903	3,390	2,825	6,788	43.2%
International calls						
2007	5,944	1,832	363	1,728	2,021	30.8%
2008	6,390	1,852	366	2,038	2,133	29.0%
2008 Q1	1,609	475	98	447	589	29.5%
2008 Q2	1,636	467	92	528	549	28.5%
2008 Q3	1,565	455	87	534	490	29.1%
2008 Q4	1,579	455	89	530	505	28.8%
2009 Q1	1,567	452	86	550	479	28.9%
Calls to mobiles						
2007	14,359	7,192	1,589	1,149	4,428	50.1%
2008	13,300	6,266	1,328	1,301	4,405	47.1%
2008 Q1	3,439	1,655	355	302	1,127	48.1%
2008 Q2	3,425	1,616	341	355	1,113	47.2%
2008 Q3	3,315	1,543	323	359	1,089	46.6%
2008 Q4	3,121	1,452	309	284	1,076	46.5%
2009 Q1	3,138	1,397	296	345	1,100	44.5%
Other calls[1]						
2007	44,936	27,061	6,483	2,314	9,078	60.2%
2008	32,753	17,689	3,846	2,696	8,522	54.0%
2008 Q1	8,995	5,261	943	582	2,209	58.5%
2008 Q2	8,338	4,458	982	688	2,210	53.5%
2008 Q3	8,011	4,184	992	732	2,103	52.2%
2008 Q4	7,409	3,786	929	694	2,000	51.1%
2009 Q1	7,286	3,655	889	691	2,051	50.2%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types. All dial-up calls to the internet are also included. BT figures include calls made to non-BT internet service providers via FRIACO.

Table 6

Summary of residential network access & call revenues by operator (£millions)

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2007	5,944	3,741	1,071	1,131	62.9%
2008	5,900	3,527	1,055	1,317	59.8%
2008 Q1	1,463	879	271	313	60.1%
2008 Q2	1,507	914	264	329	60.7%
2008 Q3	1,457	865	260	332	59.3%
2008 Q4	1,472	869	260	343	59.0%
2009 Q1	1,402	812	260	330	57.9%
Access					
2007	2,968	1,951	540	477	65.7%
2008	3,065	1,936	532	597	63.2%
2008 Q1	741	472	135	134	63.6%
2008 Q2	784	507	132	145	64.6%
2008 Q3	765	480	132	153	62.7%
2008 Q4	775	477	133	164	61.6%
2009 Q1	741	454	135	152	61.3%
Calls[1]					
2007	2,975	1,791	531	654	60.2%
2008	2,835	1,592	523	720	56.1%
2008 Q1	722	407	136	179	56.4%
2008 Q2	724	408	132	184	56.4%
2008 Q3	692	385	128	179	55.6%
2008 Q4	697	392	127	178	56.2%
2009 Q1	661	358	126	178	54.1%

[1] Revenue figures are not intended to include subscription revenues for unmetered dial-up internet access although some element may remain.

Table 7

Summary of residential exchange line numbers at end of quarter by operator (000's)

	All Operators	BT	Virgin Media	Other	BT share
2007	23,547	16,047	4,114	3,385	68.2%
2008	23,521	14,954	4,170	4,397	63.6%
2008 Q1	23,548	15,790	4,133	3,625	67.1%
2008 Q2	23,515	15,521	4,142	3,852	66.0%
2008 Q3	23,512	15,287	4,154	4,071	65.0%
2008 Q4	23,521	14,954	4,170	4,397	63.6%
2009 Q1	23,459	14,513	4,177	4,769	61.9%

Table 8

Summary of residential call volumes by operator (millions of minutes)[1]

	All Operators	BT[1]	Virgin Media	Other	BT share[1]
2007	110,727	60,669	19,870	30,188	54.8%
2008	99,471	49,180	16,717	33,574	49.4%
2008 Q1	26,176	13,562	4,391	8,223	51.8%
2008 Q2	25,087	12,234	4,173	8,680	48.8%
2008 Q3	24,115	11,783	4,044	8,288	48.9%
2008 Q4	24,093	11,601	4,109	8,383	48.2%
2009 Q1	24,290	11,354	4,031	8,905	46.7%

[1] Includes calls made to non-BT internet service providers via FRIACO.

Table 9

Summary of residential call revenues by call type and operator (£millions)

	All Operators	BT	Virgin Media	Other	BT share
UK geographic calls					
2007	874	517	154	203	59.2%
2008	880	508	138	233	57.8%
2008 Q1	212	119	37	56	55.9%
2008 Q2	227	134	34	59	58.9%
2008 Q3	218	125	34	59	57.4%
2008 Q4	223	131	34	59	58.7%
2009 Q1	224	126	36	62	56.4%
International calls					
2007	313	165	39	108	52.8%
2008	310	150	46	114	48.4%
2008 Q1	78	38	11	29	48.8%
2008 Q2	80	38	12	30	48.2%
2008 Q3	76	37	11	28	48.4%
2008 Q4	76	36	12	28	48.0%
2009 Q1	72	34	11	27	46.7%
Calls to mobiles					
2007	981	504	177	299	51.4%
2008	961	448	180	332	46.6%
2008 Q1	250	117	48	85	46.9%
2008 Q2	246	115	47	85	46.6%
2008 Q3	235	109	44	83	46.2%
2008 Q4	229	107	42	80	46.9%
2009 Q1	220	101	40	80	45.7%
Other calls[1]					
2007	808	604	160	43	74.8%
2008	685	486	158	41	71.0%
2008 Q1	182	134	40	9	73.2%
2008 Q2	170	121	40	10	70.9%
2008 Q3	163	114	39	10	70.2%
2008 Q4	169	117	40	12	69.3%
2009 Q1	145	97	39	9	66.9%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types. Figures are not intended to include subscription revenues for unmetered dial-up internet access although some element may remain.

Table 10

Summary of residential call volumes by call type and operator (millions of minutes)

	All Operators	BT	Virgin Media	Other	BT share
UK geographic calls					
2007	66,508	34,715	12,469	19,324	52.2%
2008	65,498	31,450	12,037	22,011	48.0%
2008 Q1	16,845	8,347	3,198	5,300	49.6%
2008 Q2	16,435	7,772	2,977	5,686	47.3%
2008 Q3	15,886	7,587	2,867	5,432	47.8%
2008 Q4	16,332	7,744	2,995	5,593	47.4%
2009 Q1	16,720	7,668	2,971	6,081	45.9%
International calls					
2007	3,195	1,191	296	1,708	37.3%
2008	3,935	1,243	307	2,385	31.6%
2008 Q1	956	316	82	558	33.1%
2008 Q2	1,016	308	77	631	30.3%
2008 Q3	960	305	73	582	31.8%
2008 Q4	1,003	314	75	614	31.3%
2009 Q1	1,005	309	74	622	30.8%
Calls to mobiles					
2007	7,544	4,182	1,200	2,162	55.4%
2008	6,855	3,505	981	2,369	51.1%
2008 Q1	1,789	933	266	590	52.2%
2008 Q2	1,758	901	253	604	51.2%
2008 Q3	1,679	858	236	585	51.1%
2008 Q4	1,629	813	226	590	49.9%
2009 Q1	1,550	760	210	580	49.0%
Other calls*					
2007	33,480	20,581	5,905	6,994	61.5%
2008	23,183	12,982	3,392	6,809	56.0%
2008 Q1	6,587	3,966	845	1,776	60.2%
2008 Q2	5,878	3,253	866	1,759	55.3%
2008 Q3	5,589	3,033	868	1,688	54.3%
2008 Q4	5,130	2,730	813	1,587	53.2%
2009 Q1	5,015	2,617	776	1,622	52.2%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types. All dial-up calls to the internet are also included. BT figures include calls made to non-BT internet service providers via FRIACO.

Table 11

Summary of business network access & call revenues by operator (£millions)

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2007	3,541	2,041	135	1,365	57.6%
2008	3,329	1,835	120	1,374	55.1%
2008 Q1	862	488	31	343	56.6%
2008 Q2	849	470	31	348	55.4%
2008 Q3	822	448	30	343	54.6%
2008 Q4	796	428	28	340	53.8%
2009 Q1	821	432	28	361	52.6%
Access					
2007	1,808	1,193	39	576	66.0%
2008	1,803	1,108	39	655	61.5%
2008 Q1	463	293	9	160	63.4%
2008 Q2	450	277	10	162	61.7%
2008 Q3	450	275	10	165	61.2%
2008 Q4	440	262	10	168	59.6%
2009 Q1	444	263	10	172	59.1%
Calls[1]					
2007	1,733	847	97	789	48.9%
2008	1,526	727	81	719	47.6%
2008 Q1	399	195	22	182	48.9%
2008 Q2	399	193	21	186	48.3%
2008 Q3	372	173	20	179	46.6%
2008 Q4	356	166	19	172	46.5%
2009 Q1	377	170	19	189	45.0%

[1] Revenue figures are not intended to include subscription revenues for unmetered dial-up internet access although some element may remain.

Table 12

Summary of business exchange line numbers at end of quarter by operator (000's)

	All Operators	BT	Virgin Media	Other	BT share
2007	9,743	6,198	410	3,135	63.6%
2008	9,527	5,613	435	3,480	58.9%
2008 Q1	9,620	5,985	395	3,240	62.2%
2008 Q2	9,594	5,875	395	3,325	61.2%
2008 Q3	9,562	5,748	399	3,415	60.1%
2008 Q4	9,527	5,613	435	3,480	58.9%
2009 Q1	9,479	5,494	429	3,556	58.0%

Table 13

Summary of business call volumes by operator (millions of minutes)[1]

	All Operators	BT[1]	Virgin Media	Other Direct Access	Other Indirect Access	BT share[1]
2007	49,995	21,211	2,999	10,148	15,637	42.4%
2008	44,079	17,735	2,555	9,713	14,076	40.2%
2008 Q1	11,467	4,777	649	2,433	3,608	41.7%
2008 Q2	11,230	4,569	642	2,472	3,547	40.7%
2008 Q3	11,013	4,348	646	2,486	3,533	39.5%
2008 Q4	10,369	4,041	618	2,322	3,388	39.0%
2009 Q1	10,558	4,005	630	2,260	3,663	37.9%

[1] Includes calls made to non-BT internet service providers via FRIACO

Table 14

Summary of business call revenues by call type and operator (£millions)

	All Operators	BT	Virgin Media	Other	BT share
UK geographic calls					
2008	508	245	23	240	48.2%
2008 Q1	133	64	6	63	48.1%
2008 Q2	133	65	6	61	49.3%
2008 Q3	124	61	6	58	48.7%
2008 Q4	118	55	5	58	46.5%
2009 Q1	124	57	5	62	46.2%
International calls					
2007	263	113	6	144	43.1%
2008	268	102	6	160	38.1%
2008 Q1	69	28	2	40	40.2%
2008 Q2	72	29	2	41	40.1%
2008 Q3	63	22	1	39	35.3%
2008 Q4	65	23	1	40	36.2%
2009 Q1	64	23	1	39	36.7%
Calls to mobiles					
2007	687	299	45	343	43.5%
2008	608	270	39	299	44.4%
2008 Q1	156	70	10	76	44.9%
2008 Q2	158	70	10	78	44.1%
2008 Q3	152	66	10	76	43.3%
2008 Q4	142	64	9	68	45.5%
2009 Q1	152	67	9	76	44.0%
Other calls[1]					
2007	189	143	15	30	75.8%
2008	143	110	13	20	76.9%
2008 Q1	41	33	3	4	81.4%
2008 Q2	37	29	3	5	77.8%
2008 Q3	33	25	3	5	75.5%
2008 Q4	33	23	3	6	71.7%
2009 Q1	37	22	3	12	59.5%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types. Figures are not intended to include subscription revenues for unmetered dial-up internet access although some element may remain.

Table 15

Summary of business call volumes by call type and operator (millions of minutes)

	All Operators	BT	Virgin Media	Other Direct Access	Other Indirect Access	BT share
UK geographic calls						
2007	29,313	11,418	1,965	6,120	9,810	39.0%
2008	25,846	9,895	1,695	5,841	8,415	38.3%
2008 Q1	6,815	2,662	446	1,476	2,231	39.1%
2008 Q2	6,545	2,552	423	1,476	2,094	39.0%
2008 Q3	6,417	2,427	421	1,482	2,087	37.8%
2008 Q4	6,069	2,254	405	1,407	2,003	37.1%
2009 Q1	6,186	2,235	419	1,324	2,208	36.1%
International calls						
2007	2,747	640	67	1,395	645	23.3%
2008	2,454	608	59	1,218	568	24.8%
2008 Q1	653	159	16	318	160	24.3%
2008 Q2	619	158	15	306	140	25.5%
2008 Q3	605	150	14	304	137	24.8%
2008 Q4	577	141	14	290	132	24.5%
2009 Q1	562	143	12	272	135	25.4%
Calls to mobiles						
2007	6,816	3,011	389	970	2,446	44.2%
2008	6,444	2,760	347	973	2,364	42.8%
2008 Q1	1,651	722	89	245	594	43.7%
2008 Q2	1,666	715	88	264	599	42.9%
2008 Q3	1,635	685	87	266	597	41.9%
2008 Q4	1,492	638	83	197	574	42.8%
2009 Q1	1,587	637	86	251	613	40.1%
Other calls*						
2007	11,119	6,142	578	1,663	2,736	55.2%
2008	9,335	4,472	454	1,681	2,728	47.9%
2008 Q1	2,348	1,234	98	393	623	52.6%
2008 Q2	2,399	1,144	116	425	714	47.7%
2008 Q3	2,357	1,086	124	435	712	46.1%
2008 Q4	2,232	1,008	116	428	679	45.2%
2009 Q1	2,223	990	113	412	708	44.5%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types. All dial-up calls to the internet are also included. BT figures include calls made to non-BT internet service providers via FRIACO.

Table 16

Summary of residential and small business broadband connections (000's)[1]

	Total	BT retail DSL	Other DSL	Virgin Media Cable	Other (inc. LLU)	BT retail share
2007	15,606	4,139	4,290	3,414	3,764	26.5%
2008	17,276	4,545	3,509	3,683	5,539	26.3%
2008 Q1	16,198	4,289	4,071	3,502	4,336	26.5%
2008 Q2	16,602	4,396	3,846	3,563	4,797	26.5%
2008 Q3	16,924	4,464	3,714	3,626	5,120	26.4%
2008 Q4	17,276	4,545	3,509	3,683	5,539	26.3%
2009 Q1	17,557	4,641	3,400	3,730	5,786	26.4%

[1] Figures exclude corporate broadband connections; BT retail DSL numbers have been adjusted to exclude corporate broadband based on Ofcom estimates.

3. Mobile telecoms market data tables

2009 Q1 (January to March 2008)

Table

Note: The data in these tables are the most accurate currently available. Where historical restatements have occurred, this is due to either operator restatements or improvements in methodology.

Table 1

Estimated retail revenues generated by mobile telephony (£m)[1]

	Vodafone[2]	O2[3]	T-Mobile[5]	Orange[4]
Calls and other charges				
2008 Q1	780	717	542	676
2008 Q2	787	727	553	708
2008 Q3	782	777	571	711
2008 Q4	766	744	577	685
2009 Q1	729	735	541	663
SMS and MMS				
2008 Q1	195	279	138	118
2008 Q2	189	283	117	111
2008 Q3	188	279	113	105
2008 Q4	187	278	103	107
2009 Q1	175	271	105	100
Total				
2008 Q1	975	996	681	795
2008 Q2	976	1,010	670	820
2008 Q3	970	1,056	685	816
2008 Q4	954	1,022	680	792
2009 Q1	904	1,006	645	763

[1] This table shows retail revenue for each of the mobile networks. It includes estimated retail revenues from Independent Service Providers unless otherwise stated. While the methods of estimation differ for each of the networks Ofcom believes that the figures are comparable. The revenue figures exclude revenues from connections.

Other charges include data charges other than SMS and MMS.

[2] Vodafone figures do not include those for MVNOs.

[3] O2 figures do not include those for Tesco Mobile.

[4] Orange figures do not include those for MVNOs.

[5] T-Mobile revenue figures have been revised following the addition of Virgin Mobile data revenues and the reallocation of revenue from SMS-only bundles from ‘Calls to other charges’ revenue to ‘SMS and MMS’ revenue.

Table 2

Call volumes by call type and operator (millions of minutes)

	Vodafone[1]	O2[2]	T-Mobile[3]	Orange[4]
UK calls				
2008 Q1	6,371	6,924	4,885	5,418
2008 Q2	6,333	7,411	4,796	5,675
2008 Q3	6,216	7,624	4,717	5,646
2008 Q4	6,367	8,095	4,766	5,695
2009 Q1	6,303	8,590	4,659	5,719
Outgoing international				
2008 Q1	105	176	61	79
2008 Q2	124	189	57	82
2008 Q3	129	187	49	81
2008 Q4	127	191	48	81
2009 Q1	148	187	44	80
While roaming abroad				
2008 Q1	163	138	36	88
2008 Q2	184	173	44	105
2008 Q3	202	213	56	125
2008 Q4	147	143	32	72[5]
2009 Q1	140	134	29	64
All calls				
2008 Q1	6,639	7,238	4,982	5,585
2008 Q2	6,641	7,773	4,897	5,862
2008 Q3	6,547	8,024	4,822	5,852
2008 Q4	6,641	8,429	4,846	5,848
2009 Q1	6,591	8,911	4,732	5,863

[1] Vodafone volumes do not include figures for MVNOs.

[2] O2 volumes do not include figures for Tesco Mobile.

[3] T-Mobile volumes do not include figures for Virgin Mobile.

[4] Orange volumes do not include figures for MVNOs.

[5] Figure revised from previous publication of tables.

Table 3

Volume of SMS and MMS (millions)

	Vodafone[1]	O2[2]	T-Mobile[3]	Orange
2007 Q4	3,458	6,892	2,154	4,444
2008 Q1	3,499	7,382	2,154	4,712
2008 Q2	3,632	7,836	2,208	4,811
2008 Q3	4,003	8,565	2,484	5,418
2009 Q1	4,170	8,950	2,558	5,679

[1] Vodafone volumes do not include figures for MVNOs.

[2] O2 volumes do not include figures for Tesco Mobile.

[3] T-Mobile volumes do not include figures for Virgin Mobile.

[4] Orange volumes do not include figures for MVNOs.

Table 4

Subscriber numbers by operator (000's)

	Vodafone[1]	O2[2]	T-Mobile[3]	Orange
Connections during period				
2008 Q1	1,745	1,695	1,721	1,515
2008 Q2	1,791	1,588	1,522	1,457
2008 Q3	2,013	1,814	1,220	1,699
2008 Q4	2,080	2,021	1,256	2,041
2009 Q1	1,707	1,827	1,515	1,498
Subscribers at end of period				
Post-pay				
2008 Q1	7,424	7,015	3,861	5,722
2008 Q2	7,543	7,153	3,917	5,852
2008 Q3	7,702	7,430	4,013	6,013
2008 Q4	7,904	7,607	4,056	6,173
2009 Q1	7,772	7,862	4,109	6,298
Pre-pay				
2008 Q1	8,708	11,338	13,263	10,034
2008 Q2	8,634	11,525	12,877	9,905
2008 Q3	8,820	11,649	12,789	9,802
2008 Q4	8,661	11,863	12,730	9,822
2009 Q1	8,246	11,718	12,576	9,552
Total				
2008 Q1	16,132	18,353	17,124	15,756
2008 Q2	16,177	18,678	16,794	15,757
2008 Q3	16,522	19,080	16,802	15,815
2008 Q4	16,565	19,470	16,786	15,995
2009 Q1	16,018	19,580	16,684	15,850
Net change during period				
2008 Q1	-53	-29	-187	114
2008 Q2	45	325	-330	1
2008 Q3	345	402	8	57
2008 Q4	44	390	-16	180
2009 Q1	-547	110	-101	-145

[1] Vodafone subscriber numbers do not include MVNOs.

[2] O2 subscriber numbers do not include Tesco Mobile.

[3] The threshold period for active subscribers is 90 days for all networks except T-Mobile, which uses the 180-day activity definition. This should be taken into account when comparing data in the table above.

[4] Orange subscriber numbers do not include MVNOs.

Table 5
Average retail revenue per subscriber (£)[1]

	Vodafone[2]	O2[3]	T-Mobile[5]	Orange
2008 Q1	60.3	54.2	39.5	50.6
2008 Q2	60.4	54.6	39.5	52.0
2008 Q3	59.3	55.9	40.8	51.7
2008 Q4	57.7	53.0	40.5	49.8
2009 Q1	55.5	51.5	38.5	47.9

[1] Revenues are from services detailed in Table 1 only and do not include those generated by incoming calls or VAT.

[2] Vodafone figures do not include MVNOs.

[3] O2 figures do not include Tesco Mobile.

[4] Orange figures do not include MVNOs.

[5] T-Mobile revenue figures have been revised following the addition of Virgin Mobile data revenue.

Table 6
Interconnection call volumes (millions of minutes)

	Vodafone[1]	O2[2]	T-Mobile[3]	Orange
Call volumes				
2008 Q1	2,677	4,286	2,204	3,118
2008 Q2	2,730	4,462	2,248	3,243
2008 Q3	2,701	4,474	2,203	3,242
2008 Q4	2,676	4,528	2,182	3,282
2009 Q1	2,756	4,551	2,194	3,314

[1] Vodafone volumes do not include figures for MVNOs.

[2] O2 volumes do not include figures for Tesco Mobile.

[3] T-Mobile volumes do not include figures for Virgin Mobile.

[4] Orange volumes do not include figures for MVNOs.