Telecommunications market data tables Q2 2010

1 – Market monitor

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1. Market monitor

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

Fixed voice

- Total UK fixed-line revenues were £2.3bn in Q2 2010, 4.5% lower than they had been a year previously.
- Over the same period total UK fixed call volumes fell by 3.8% to 31.1 billion minutes and the total number of UK fixed lines fell by 1.0% to 33.4 million.
- BT's share of total fixed-line revenues was 52.1% in Q2 2010, 5.3 percentage points lower that it had been a year previously.

Fixed broadband

- At the end of Q2 2010 there were an estimated 18.8 million UK non-corporate fixed broadband connections, an increase of 6.3% on a year previously.
- BT continued to be the largest provider of non-corporate broadband connections, with an estimated share of 27.0%, an annual increase of 0.4 percentage points.

Mobile[1]

- Total mobile revenues declined by 2.6% between Q2 2009 and Q2 2010 across the three mobile operators covered in the data tables (Everything Everywhere, O2 and Vodafone). Revenues from calls and other charges and messaging services decreased by 1.5% and 7.2% respectively.
- Total call volumes for the three operators increased by 4.1% between Q2 2009 and Q2 2010, a slower rate of increase than the previous quarter (+6.1%). Calls to international destinations declined by 7% year-on-year; in contrast international roaming calls volumes increased by 9% over the same period.
- There were over 27 billlion SMS and MMS messages sent from the three networks in Q2 2010, a 22% increase on Q2 2009 volumes; however quarter-on-quarter growth slowed to just 1% between Q1 2010 and Q2 2010.
- The number of active mobile subscribers for Everything Everywhere, O2 and Vodafone (excluding MVNO connections) stood at 65 million at the end of Q2 2010 with more than 45% on post-pay.

[1] The commentary provided only refers to the three (four before the merger of Orange and T-Mobile) mobile operators covered in this report.

2. Fixed telecoms market data tables

Q2 2010 (April to June 2010)

A number of amendments have been made to the fixed telecoms figures in this update:

1) Fixed line numbers and revenues now include previously provided, although unpublished, data on connections other than PSTN lines and ISDN channels;

2) 'Other Direct' operator call volumes have been updated to reflect more accurate operator data received by Ofcom;

3) Ofcom estimates of 'Other Indirect' operator call volumes for telecoms providers that do not submit regular quarterly data have been revised;

4) 'Other' operator call revenues have been updated to reflect changes 2) and 3) above; and

5) Ofcom's estimate of non-corporate BT retail broadband connection numbers has been adjusted.

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

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

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2008	9,956	5,825	1,205	2,925	58.5%
2009	9,456	5,308	1,152	2,996	56.1%
2009 Q2	2,404	1,380	285	739	57.4%
2009 Q3	2,328	1,303	286	740	56.0%
2009 Q4	2,380	1,282	293	805	53.9%
2010 Q1	2,330	1,225	287	817	52.6%
2010 Q2	2,296	1,195	291	809	52.1%
Access					
2008	5,128	3,433	601	1,095	66.9%
2009	4,932	3,166	576	1,190	64.2%
2009 Q2	1,266	833	144	289	65.8%
2009 Q3	1,223	777	144	302	63.5%
2009 Q4	1,222	754	144	324	61.7%
2010 Q1	1,221	737	145	339	60.4%
2010 Q2	1,228	726	153	348	59.2%
Calls[1]					
2008	4,827	2,392	604	1,831	49.6%
2009	4,524	2,142	576	1,805	47.4%
2009 Q2	1,138	547	140	450	48.1%
2009 Q3	1,105	525	142	437	47.5%
2009 Q4	1,158	528	149	481	45.6%
2010 Q1	1,109	488	142	479	44.0%
2010 Q2	1,068	469	138	461	43.9%

[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
2008	34,237	21,251	4,859	8,127	62.1%
2009	33,539	18,843	4,920	9,775	56.2%
2009 Q2	33,758	19,924	4,844	8,991	59.0%
2009 Q3	33,626	19,374	4,852	9,400	57.6%
2009 Q4	33,539	18,843	4,920	9,775	56.2%
2010 Q1	33,455	18,414	4,942	10,099	55.0%
2010 Q2	33,413	17,953	4,944	10,516	53.7%

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]
2008	143,617	67,152	19,272	16,974	40,219	46.8%
2009	131,465	56,640	17,408	18,166	39,251	43.1%
2009 Q2	32,292	13,942	4,238	4,356	9,756	43.2%
2009 Q3	31,609	13,684	4,238	4,297	9,390	43.3%
2009 Q4	32,984	13,607	4,271	4,999	10,106	41.3%
2010 Q1	33,611	13,566	4,286	5,417	10,341	40.4%
2010 Q2	31,061	12,102	3,851	5,570	9,537	39.0%

[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					
2008	1,356	753	161	442	55.5%
2009	1,331	725	167	439	54.4%
2009 Q2	328	180	39	109	54.8%
2009 Q3	323	174	41	107	54.0%
2009 Q4	351	187	46	117	53.4%
2010 Q1	343	180	43	121	52.3%
2010 Q2	321	168	41	111	52.5%
International calls					
2008	554	252	53	249	45.5%
2009	443	211	47	186	47.5%
2009 Q2	113	53	12	48	47.2%
2009 Q3	106	51	12	44	48.0%
2009 Q4	106	49	12	45	46.5%
2010 Q1	107	49	11	47	45.9%
2010 Q2	101	45	11	46	44.4%
Calls to mobiles					
2008	1,661	718	220	723	43.2%
2009	1,576	641	194	741	40.7%
2009 Q2	397	163	49	185	41.0%
2009 Q3	388	159	48	180	41.1%
2009 Q4	398	152	48	199	38.1%
2010 Q1	380	135	45	200	35.5%
2010 Q2	362	128	44	190	35.3%
Other calls[1]					
2008	1,256	669	170	417	53.3%
2009	1,173	565	168	440	48.2%
2009 Q2	300	152	41	108	50.4%
2009 Q3	288	141	41	107	48.8%
2009 Q4	303	139	44	120	46.0%
2010 Q1	279	124	43	111	44.7%
2010 Q2	285	128	43	114	45.0%

[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						
2008	91,884	41,345	13,732	10,784	26,023	45.0%
2009	88,262	36,503	12,646	11,863	27,251	41.4%
2009 Q2	21,528	8,885	3,059	2,806	6,777	41.3%
2009 Q3	21,119	8,738	3,049	2,784	6,548	41.4%
2009 Q4	22,663	8,977	3,148	3,372	7,166	39.6%
2010 Q1	23,280	9,018	3,183	3,686	7,393	38.7%
2010 Q2	21,035	7,925	2,808	3,518	6,784	37.7%
International calls						
2008	6,427	1,852	366	2,049	2,160	28.8%
2009	6,161	1,709	338	2,182	1,932	27.7%
2009 Q2	1,565	426	83	542	513	27.2%
2009 Q3	1,483	407	84	531	461	27.4%
2009 Q4	1,548	424	85	555	484	27.4%
2010 Q1	1,583	421	85	580	497	26.6%
2010 Q2	1,577	405	82	625	465	25.7%
Calls to mobiles						
2008	13,277	6,266	1,328	1,431	4,252	47.2%
2009	12,152	5,254	1,124	1,397	4,377	43.2%
2009 Q2	3,005	1,323	283	338	1,061	44.0%
2009 Q3	2,981	1,297	279	320	1,085	43.5%
2009 Q4	3,018	1,237	266	375	1,141	41.0%
2010 Q1	3,034	1,206	258	394	1,175	39.8%
2010 Q2	2,861	1,131	244	387	1,099	39.5%
Other calls[1]						
2008	32,028	17,689	3,846	2,710	7,783	55.2%
2009	24,889	13,174	3,300	2,724	5,691	52.9%
2009 Q2	6,195	3,308	813	669	1,405	53.4%
2009 Q3	6,026	3,242	826	663	1,295	53.8%
2009 Q4	5,754	2,969	772	698	1,315	51.6%
2010 Q1	5,714	2,921	760	757	1,276	51.1%
2010 Q2	5,588	2,641	717	1,041	1,190	47.3%

[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]					
2008	6,075	3,617	1,055	1,402	59.5%
2009	5,997	3,363	1,044	1,590	56.1%
2009 Q2	1,531	886	258	387	57.9%
2009 Q3	1,479	822	259	398	55.6%
2009 Q4	1,541	826	268	448	53.6%
2010 Q1	1,506	789	261	456	52.4%
2010 Q2	1,501	776	265	459	51.7%
Access					
2008	3,136	2,025	532	579	64.6%
2009	3,111	1,893	538	680	60.9%
2009 Q2	806	509	135	163	63.1%
2009 Q3	773	464	134	175	60.0%
2009 Q4	778	450	135	194	57.8%
2010 Q1	780	441	135	205	56.5%
2010 Q2	800	437	143	219	54.7%
Calls[1]					
2008	2,939	1,592	523	824	54.2%
2009	2,887	1,470	506	911	50.9%
2009 Q2	725	377	123	225	52.0%
2009 Q3	706	359	125	222	50.8%
2009 Q4	763	376	133	254	49.3%
2010 Q1	725	348	126	252	48.0%
2010 Q2	702	339	122	240	48.4%

[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
2008	23,528	14,956	4,170	4,402	63.6%
2009	23,376	13,330	4,249	5,797	57.0%
2009 Q2	23,390	14,089	4,169	5,132	60.2%
2009 Q3	23,361	13,696	4,182	5,483	58.6%
2009 Q4	23,376	13,330	4,249	5,797	57.0%
2010 Q1	23,434	13,047	4,292	6,095	55.7%
2010 Q2	23,470	12,703	4,304	6,463	54.1%

Table 8

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

	All Operators	BT[1]	Virgin Media	Other	BT share[1]
2008	98,502	49,180	16,717	32,605	49.9%
2009	92,861	41,586	15,039	36,236	44.8%
2009 Q2	22,778	10,179	3,664	8,935	44.7%
2009 Q3	22,526	9,963	3,642	8,921	44.2%
2009 Q4	23,601	10,090	3,702	9,809	42.8%
2010 Q1	23,875	9,954	3,701	10,220	41.7%
2010 Q2	21,779	8,700	3,306	9,773	39.9%

[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					
2008	842	508	138	195	60.3%
2009	901	518	148	235	57.5%
2009 Q2	219	128	34	58	58.3%
2009 Q3	220	124	36	60	56.2%
2009 Q4	249	141	42	66	56.6%
2010 Q1	240	133	39	68	55.6%
2010 Q2	225	127	37	62	56.2%
International calls					
2008	277	150	46	81	54.1%
2009	251	129	43	80	51.2%
2009 Q2	63	33	10	20	51.3%
2009 Q3	62	31	11	20	50.5%
2009 Q4	63	31	11	21	49.6%
2010 Q1	61	30	10	21	49.3%
2010 Q2	58	27	9	21	47.6%
Calls to mobiles					
2008	945	448	180	317	47.4%
2009	897	395	158	344	44.0%
2009 Q2	227	101	40	85	44.7%
2009 Q3	221	98	40	83	44.4%
2009 Q4	231	95	39	97	41.2%
2010 Q1	219	89	37	94	40.5%
2010 Q2	212	86	35	91	40.4%
Other calls[1]					
2008	874	486	158	230	55.6%
2009	838	428	158	252	51.1%
2009 Q2	216	116	39	61	53.7%
2009 Q3	203	106	38	59	52.0%
2009 Q4	221	109	42	70	49.4%
2010 Q1	205	96	41	69	46.7%
2010 Q2	207	100	40	67	48.1%

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					
2008	65,732	31,450	12,037	22,245	47.8%
2009	65,444	28,215	11,079	26,150	43.1%
2009 Q2	15,969	6,816	2,678	6,475	42.7%
2009 Q3	15,766	6,695	2,658	6,413	42.5%
2009 Q4	17,005	7,036	2,772	7,197	41.4%
2010 Q1	17,418	7,026	2,795	7,597	40.3%
2010 Q2	15,503	6,081	2,448	6,974	39.2%
International calls					
2008	3,769	1,243	307	2,219	33.0%
2009	4,100	1,171	289	2,640	28.6%
2009 Q2	1,049	291	71	687	27.7%
2009 Q3	1,011	280	70	661	27.7%
2009 Q4	1,052	291	74	687	27.7%
2010 Q1	1,058	280	73	705	26.5%
2010 Q2	1,050	265	71	714	25.2%
Calls to mobiles					
2008	6,773	3,505	981	2,287	51.7%
2009	6,224	2,869	792	2,563	46.1%
2009 Q2	1,560	728	202	630	46.7%
2009 Q3	1,563	704	195	664	45.0%
2009 Q4	1,552	677	185	690	43.6%
2010 Q1	1,480	629	171	680	42.5%
2010 Q2	1,399	583	163	653	41.7%
Other calls*					
2008	22,227	12,982	3,392	5,853	58.4%
2009	17,092	9,331	2,879	4,882	54.6%
2009 Q2	4,200	2,344	713	1,143	55.8%
2009 Q3	4,186	2,284	719	1,183	54.6%
2009 Q4	3,992	2,086	671	1,235	52.2%
2010 Q1	3,920	2,019	662	1,239	51.5%
2010 Q2	3,827	1,771	624	1,432	46.3%

[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]					
2008	3,807	2,135	150	1,523	56.1%
2009	3,398	1,885	108	1,405	55.5%
2009 Q2	858	479	27	352	55.8%
2009 Q3	834	464	27	342	55.7%
2009 Q4	825	441	26	357	53.5%
2010 Q1	812	424	26	361	52.3%
2010 Q2	781	406	26	350	52.0%
Access					
2008	1,992	1,408	68	516	70.7%
2009	1,821	1,272	38	511	69.9%
2009 Q2	460	324	10	126	70.4%
2009 Q3	451	314	10	127	69.7%
2009 Q4	444	304	10	131	68.5%
2010 Q1	440	297	10	134	67.4%
2010 Q2	428	289	10	129	67.6%
Calls[1]					
2008	1,815	727	81	1,007	40.0%
2009	1,577	612	70	895	38.8%
2009 Q2	398	155	18	225	38.9%
2009 Q3	383	151	17	215	39.3%
2009 Q4	380	137	16	227	36.1%
2010 Q1	371	128	16	227	34.4%
2010 Q2	353	117	16	221	33.0%

[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
2008	10,710	6,295	689	3,725	58.8%
2009	10,163	5,513	672	3,978	54.2%
2009 Q2	10,368	5,835	675	3,859	56.3%
2009 Q3	10,265	5,678	670	3,917	55.3%
2009 Q4	10,163	5,513	672	3,978	54.2%
2010 Q1	10,021	5,367	651	4,003	53.6%
2010 Q2	9,944	5,250	640	4,053	52.8%

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]
2008	44,878	17,735	2,555	10,162	14,426	39.5%
2009	38,433	14,883	2,369	8,371	12,809	38.7%
2009 Q2	9,474	3,723	574	2,099	3,078	39.3%
2009 Q3	9,036	3,674	596	1,875	2,891	40.7%
2009 Q4	9,347	3,481	569	2,011	3,286	37.2%
2010 Q1	9,704	3,580	585	2,013	3,525	36.9%
2010 Q2	9,251	3,371	545	2,044	3,291	36.4%

[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	514	245	23	246	47.6%
2009	430	206	19	205	48.0%
2009 Q2	109	52	5	52	47.9%
2009 Q3	103	51	5	47	49.3%
2009 Q4	102	47	5	51	45.5%
2010 Q1	104	46	5	53	44.7%
2010 Q2	95	42	4	49	43.8%
International calls					
2008	277	102	6	168	36.9%
2009	192	82	5	105	42.7%
2009 Q2	50	21	1	28	42.0%
2009 Q3	44	20	1	23	44.3%
2009 Q4	43	18	1	24	42.1%
2010 Q1	46	19	1	26	41.2%
2010 Q2	43	17	1	25	40.1%
Calls to mobiles					
2008	716	270	39	406	37.7%
2009	679	246	36	397	36.3%
2009 Q2	170	61	9	100	36.1%
2009 Q3	167	62	9	97	36.8%
2009 Q4	167	57	9	102	33.9%
2010 Q1	161	46	9	106	28.7%
2010 Q2	150	42	8	100	28.0%
Other calls[1]					
2008	309	110	13	186	35.6%
2009	275	77	10	188	28.1%
2009 Q2	69	20	3	46	29.4%
2009 Q3	69	19	3	47	27.3%
2009 Q4	68	16	2	49	23.6%
2010 Q1	61	16	2	42	26.8%
2010 Q2	65	16	2	47	24.0%

[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						
2008	26,152	9,895	1,695	6,127	8,435	37.8%
2009	22,818	8,288	1,567	4,938	8,025	36.3%
2009 Q2	5,560	2,070	381	1,229	1,879	37.2%
2009 Q3	5,351	2,042	391	1,095	1,823	38.2%
2009 Q4	5,658	1,941	376	1,204	2,137	34.3%
2010 Q1	5,862	1,992	388	1,200	2,282	34.0%
2010 Q2	5,531	1,844	360	1,204	2,124	33.3%
International calls						
2008	2,657	608	59	1,249	740	22.9%
2009	2,061	538	49	1,012	462	26.1%
2009 Q2	515	135	12	260	108	26.2%
2009 Q3	473	127	14	229	102	26.9%
2009 Q4	496	133	11	234	118	26.8%
2010 Q1	524	140	12	228	144	26.7%
2010 Q2	527	140	11	240	136	26.5%
Calls to mobiles						
2008	6,503	2,760	347	1,094	2,302	42.4%
2009	5,929	2,386	332	936	2,275	40.2%
2009 Q2	1,446	596	81	234	535	41.2%
2009 Q3	1,418	593	84	204	536	41.8%
2009 Q4	1,467	560	81	227	599	38.2%
2010 Q1	1,554	577	87	231	659	37.1%
2010 Q2	1,461	548	81	223	609	37.5%
Other calls*						
2008	9,566	4,472	454	1,692	2,948	46.7%
2009	7,625	3,671	421	1,485	2,048	48.1%
2009 Q2	1,953	922	100	375	556	47.2%
2009 Q3	1,794	912	107	346	429	50.8%
2009 Q4	1,726	847	101	346	432	49.1%
2010 Q1	1,763	871	98	354	441	49.4%
2010 Q2	1,731	839	93	376	422	48.5%

[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
2008	17,274	4,545	3,508	3,683	5,539	26.3%
2009	18,740	4,876	3,639	3,845	6,381	26.0%
2009 Q2	17,719	4,715	3,285	3,742	5,977	26.6%
2009 Q3	18,198	4,775	3,502	3,781	6,139	26.2%
2009 Q4	18,740	4,876	3,639	3,845	6,381	26.0%
2010 Q1	18,574	4,997	3,022	3,917	6,638	26.9%
2010 Q2	18,840	5,092	2,882	3,943	6,924	27.0%

[1] Figures exclude corporate broadband connections; BT retail connection numbers have been adjusted to exclude corporate broadband based on Ofcom estimates and these have been amended for 2009 Q2 and 2010 Q1.

3. Mobile telecoms market data tables

Q2 2010 (April to June 2010)

From Q2 2010 onwards Orange and T-Mobile are no longer reported separately. Data covering these two merged entities is now included under the company name Everything Everywhere.

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	O2	Everything Everywhere	T-Mobile[2]	Orange
Calls and other charges					
2009 Q2	717	769		554	638
2009 Q3	715	814		565	642
2009 Q4	708	799		567	653
2010 Q1	688	792		537	669
2010 Q2	698	825	1,114		
SMS and MMS					
2009 Q2	184	269		102	82
2009 Q3	189	275		105	69
2009 Q4	205	281		98	78
2010 Q1	207	269		90	73
2010 Q2	211	266	114		
Total					
2009 Q2	901	1,038		656	720
2009 Q3	904	1,090		670	711
2009 Q4	913	1,081		665	731
2010 Q1	896	1,061		627	742
2010 Q2	909	1,091	1,228		

[1] This table shows retail revenue for each of the mobile networks. It includes estimated retail revenues from resellers but not MVNOs unless otherwise stated. While the methods of estimation differ for each of the networks Ofcom believes the figures are comparable. The figures exclude revenues from interconnection. Other charges include data charges other than SMS and MMS.

[2] Virgin Mobile revenues included.

Table 2
Call volumes by call type and operator (millions of minutes) [1]

	Vodafone	O2	Everything Everywhere	T-Mobile	Orange
UK calls					
2009 Q2	6,099	8,995		4,518	5,690
2009 Q3	6,079	9,139		4,410	5,789
2009 Q4	6,306	9,725		4,461	6,030
2010 Q1	6,502	9,712		4,473	6,181
2010 Q2	6,280	9,527	10,558		
Outgoing international					
2009 Q2	147	210		44	83
2009 Q3	144	210		46	84
2009 Q4	127	215		47	85
2010 Q1	114	197		45	82
2010 Q2	122	197	131		
While roaming abroad					
2009 Q2	169	166		36	75
2009 Q3	228	219		46	99
2009 Q4	143	149		34	62
2010 Q1	147	152		26	63
2010 Q2	177	193	116		
All calls					
2009 Q2	6,415	9,371		4,598	5,848
2009 Q3	6,451	9,568		4,502	5,972
2009 Q4	6,576	10,089		4,542	6,177
2010 Q1	6,763	10,061		4,544	6,326
2010 Q2	6,579	9,917	10,805		

[1] Figures include estimates for resellers. Call volumes from MVNOs are not included.

Table 3
Volume of SMS and MMS (millions) [1]

	Vodafone	O2	Everything Everywhere	T-Mobile	Orange
2009 Q2	4,278	9,518		2,649	5,731
2009 Q3	4,530	9,820		2,725	5,788
2009 Q4	5,045	10,935		3,184	6,501
2010 Q1	5,384	11,344		3,406	6,726
2010 Q2	5,503	11,370	10,278		

[1] SMS and MMS volumes from MVNOs are not included.

Table 4

Subscriber numbers by operator (000's)[1]

	Vodafone	O2	Everything Everywhere	T-Mobile[2]	Orange
Connections during period					
2009 Q2	1,771	1,806		1,435	1,319
2009 Q3	2,140	1,857		1,036	1,762
2009 Q4	2,149	1,965		1,412	2,511
2010 Q1	1,496	1,693		1,386	1,680
2010 Q2	1,735	1,862	2,741		
Subscribers at end of period					
Post-pay					
2009 Q2	7,909	8,155		4,109	6,443
2009 Q3	8,166	8,446		4,070	6,637
2009 Q4	8,413	8,666		4,071	6,903
2010 Q1	8,671	8,841		4,072	7,124
2010 Q2	8,911	9,116	11,463		
Pre-pay					
2009 Q2	8,098	11,658		12,479	9,410
2009 Q3	8,221	11,637		12,538	9.473
2009 Q4	8,140	11,740		13,108	9,610
2010 Q1	8,484	11,602		13,103	9,318
2010 Q2	8,409	11,545	15,630		
Total					
2009 Q2	16,007	19,813		16,588	15,853
2009 Q3	16,388	20,083		16,608	16,110
2009 Q4	16,553	20,406		17,178	16,514
2010 Q1	17,154	20,443		17,175	16,442
2010 Q2	17,320	20,661	27,093		
Net change during period					
2009 Q2	-12	233		-96	3
2009 Q3	381	270		20	257
2009 Q4	166	323		571	404
2010 Q1	601	37		-3	-72
2010 Q2	-134	217	n/a		

[1] Figures include resellers. MVNO subscribers are excluded unless otherwise stated.

The threshold period for active subscribers is 90 days for all networks unless otherwise stated.

[2] Includes Virgin Mobile subscribers. The threshold period for active T-Mobile users in this column is 180 days. This should be taken into account when comparing data in the table above.

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

	Vodafone	O2	Everything Everywhere	T-Mobile	Orange
2009 Q1	55.5	51.5		39.4	45.4
2009 Q2	56.3	52.7		40.4	44.5
2009 Q3	55.8	54.6		39.4	44.8
2009 Q4	55.4	53.4		36.5	45.0
2010 Q1	53.2	51.9			
2010 Q2	53.2	53.1	43.3		

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

Table 6
Interconnection call volumes (millions of minutes) [1]

	Vodafone	O2	Everything Everywhere	T-Mobile	Orange
2009 Q1	2,708	4,629		2,110	3,343
2009 Q2	2,801	4,699		2,128	3,324
2009 Q3	2,774	4,802		2,178	3,398
2009 Q4	2,836	4,802		2,092	3,468
2010 Q1	2,822	4,909	4,717		

[1] Shows number of call minutes terminating on each operator's network.