Telecommunications market data tables Q1 2012

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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

- The UK fixed voice market generated £2.2bn in revenues in Q1 2012, £103m (4.5%) less than was the case in Q1 2011. Fixed voice revenues fell by £19m (0.8%) during Q1 2012, having increased by £22m (1.0%) in the previous quarter.

- Total UK fixed-originated call volumes increased for the first time in four years in Q1 2012, growing by 84 million minutes (0.3%) to 28.1 billion minutes, however, this was 2.9 billion minutes (9.3%) less than the volume of outgoing fixed calls in Q1 2011.

- The total number of UK fixed lines (which includes ISDN channels) grew for the second successive quarter in Q1 2012, at the end of the period there were 33.3 million fixed lines, 26,000 (0.1%) more than there had been a year previously. During the quarter a 303,000 (1.3%) increase in the number of residential fixed lines was offset by a 223,000 (2.4%) fall in the number of business fixed lines.

Fixed broadband

- At the end of Q1 2012 there were a total of 20.9 million UK residential and SME fixed broadband connections, 1.4 million (7.4%) more than there had been a year previously.

- BT's retail share of these lines was unchanged during Q1 2012, at 29.3%. This was 0.8 percentage points higher than it had been a year previously.

Mobile

- In Q1 2012, retail mobile revenues increased by 1.4% year-on-year but decreased 2.1% quarter-on-quarter.

- In Q1 2012, the volume of calls made while roaming declined by 13.6% year-on-year, while the volume of SMS and MMS messages sent increased by 5.4% year-on-year.

- The number of postpaid active mobile subscribers now exceeds the number of prepaid active mobile subscribers, with the former accounting for 50.3%. The number of prepaid active mobile subscribers fell by 1.0million from Q4 2011 to Q1 2012, which is partly explained by seasonal factors following the Christmas period when new connections are often higher. The increase in postpaid subscribers did not make up for this decline, meaning the number of total active mobile subscribers decreased by nearly 250,000 quarter-on-quarter.

- The number of total active mobile broadband subscribers (dongles and datacards) fell by 60,000 in the first quarter of 2012 to just under 5 million. This decline may be partly due to seasonal factors and can be interpreted in the context of rapidly increasing smartphone data use, which is not captured in these figures.

2. Fixed telecoms market data tables

Q1 2012 (January to March 2012)

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]					
2010	9,407	4,714	1,164	3,529	50.1%
2011	8,912	4,313	1,073	3,526	48.4%
2011 Q1	2,298	1,117	274	907	48.6%
2011 Q2	2,209	1,085	275	848	49.1%
2011 Q3	2,192	1,053	261	877	48.1%
2011 Q4	2,214	1,058	263	894	47.8%
2012 Q1	2,195	1,034	269	892	47.1%
Access					
2010	5,003	2,837	602	1,563	56.7%
2011	5,141	2,724	617	1,800	53.0%
2011 Q1	1,286	693	151	442	53.9%
2011 Q2	1,262	683	159	420	54.1%
2011 Q3	1,266	666	149	451	52.6%
2011 Q4	1,327	683	157	486	51.5%
2012 Q1	1,339	669	170	500	49.9%
Calls[1]					
2010	4,404	1,877	562	1,965	42.6%
2011	3,772	1,589	456	1,726	42.1%
2011 Q1	1,012	424	123	464	41.9%
2011 Q2	947	403	116	428	42.5%
2011 Q3	926	388	112	426	41.9%
2011 Q4	887	374	105	408	42.2%
2012 Q1	856	366	99	391	42.7%

[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
2010	33,409	17,023	4,940	11,447	51.0%
2011	33,252	15,750	4,893	12,610	47.4%
2011 Q1	33,305	16,683	4,955	11,667	50.1%
2011 Q2	33,277	16,403	4,921	11,952	49.3%
2011 Q3	33,233	16,022	4,880	12,331	48.2%
2011 Q4	33,252	15,750	4,893	12,610	47.4%
2012 Q1	33,331	15,443	4,703	13,186	46.3%

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]
2010	130,202	49,834	15,833	22,885	41,650	38.3%
2011	116,749	43,364	13,867	24,770	34,748	37.1%
2011 Q1	30,972	11,619	3,711	6,360	9,282	37.5%
2011 Q2	29,174	10,693	3,407	6,311	8,763	36.7%
2011 Q3	28,584	10,666	3,372	5,966	8,579	37.3%
2011 Q4	28,020	10,386	3,377	6,133	8,124	37.1%
2012 Q1	28,104	10,502	3,383	6,512	7,708	37.4%

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

Table 4

Summary of call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2010	4,404	1,328	474	1,477	1,126
2011	3,772	1,156	402	1,243	971
2011 Q1	1,012	309	108	335	260
2011 Q2	947	289	101	315	242
2011 Q3	926	284	98	305	240
2011 Q4	887	274	95	289	230
2012 Q1	856	267	91	275	223

[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						
2010	88,363	33,102	11,648	15,295	28,318	37.5%
2011	79,154	29,302	10,208	16,353	23,292	37.0%
2011 Q1	21,099	7,864	2,748	4,268	6,219	37.3%
2011 Q2	19,713	7,185	2,494	4,150	5,884	36.4%
2011 Q3	19,239	7,155	2,461	3,921	5,702	37.2%
2011 Q4	19,104	7,098	2,505	4,015	5,486	37.2%
2012 Q1	19,199	7,245	2,505	4,362	5,087	37.7%
International calls						
2010	7,197	1,605	328	2,474	2,789	22.3%
2011	6,854	1,386	302	2,779	2,387	20.2%
2011 Q1	1,857	382	79	746	651	20.6%
2011 Q2	1,790	359	78	737	616	20.1%
2011 Q3	1,612	329	72	593	618	20.4%
2011 Q4	1,595	316	73	703	503	19.8%
2012 Q1	1,593	318	72	642	561	20.0%
Calls to mobiles						
2010	11,846	4,538	975	1,649	4,684	38.3%
2011	10,421	3,922	848	1,786	3,866	37.6%
2011 Q1	2,736	1,025	219	459	1,033	37.5%
2011 Q2	2,629	975	209	459	986	37.1%
2011 Q3	2,582	986	211	435	950	38.2%
2011 Q4	2,474	936	209	432	897	37.8%
2012 Q1	2,466	950	209	454	853	38.5%
Other calls[1]						
2010	22,797	10,589	2,882	3,467	5,858	46.4%
2011	20,320	8,754	2,509	3,853	5,204	43.1%
2011 Q1	5,279	2,348	665	887	1,379	44.5%
2011 Q2	5,043	2,174	626	965	1,278	43.1%
2011 Q3	5,150	2,196	628	1,017	1,309	42.6%
2011 Q4	4,848	2,036	590	984	1,238	42.0%
2012 Q1	4,847	1,989	597	1,054	1,207	41.0%

[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]					
2010	6,160	3,055	1,061	2,044	49.6%
2011	5,873	2,741	976	2,155	46.7%
2011 Q1	1,496	708	249	539	47.3%
2011 Q2	1,439	685	251	503	47.6%
2011 Q3	1,455	673	238	545	46.2%
2011 Q4	1,483	676	239	569	45.6%
2012 Q1	1,484	665	244	574	44.8%
Access					
2010	3,259	1,697	563	999	52.1%
2011	3,373	1,594	576	1,202	47.3%
2011 Q1	822	400	141	281	48.7%
2011 Q2	814	396	149	269	48.6%
2011 Q3	844	395	139	310	46.8%
2011 Q4	893	404	147	342	45.2%
2012 Q1	921	403	159	360	43.7%
Calls[1]					
2010	2,901	1,358	498	1,045	46.8%
2011	2,500	1,147	400	953	45.9%
2011 Q1	673	307	108	258	45.6%
2011 Q2	625	289	102	234	46.3%
2011 Q3	612	278	98	235	45.5%
2011 Q4	590	272	91	227	46.1%
2012 Q1	562	262	86	214	46.6%

[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
2010	23,752	12,043	4,313	7,395	50.7%
2011	23,872	11,123	4,299	8,449	46.6%
2011 Q1	23,658	11,825	4,336	7,497	50.0%
2011 Q2	23,727	11,576	4,323	7,828	48.8%
2011 Q3	23,755	11,302	4,294	8,160	47.6%
2011 Q4	23,872	11,123	4,299	8,449	46.6%
2012 Q1	24,174	10,896	4,179	9,100	45.1%

Table 8

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

	All Operators	BT[1]	Virgin Media	Other	BT share[1]
2010	90,362	36,189	13,632	40,541	40.0%
2011	80,353	31,106	11,791	37,456	38.7%
2011 Q1	21,408	8,362	3,169	9,877	39.1%
2011 Q2	20,124	7,668	2,909	9,547	38.1%
2011 Q3	19,490	7,606	2,858	9,026	39.0%
2011 Q4	19,331	7,470	2,855	9,006	38.6%
2012 Q1	19,322	7,483	2,828	9,011	38.7%

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

Table 9

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2010	2,901	935	293	849	824
2011	2,500	817	240	708	735
2011 Q1	673	220	66	189	198
2011 Q2	625	202	60	180	183
2011 Q3	612	199	58	174	180
2011 Q4	590	195	56	165	174
2012 Q1	562	189	52	153	168

[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					
2010	65,134	25,620	10,195	29,319	39.3%
2011	58,182	22,570	8,867	26,745	38.8%
2011 Q1	15,548	6,053	2,394	7,101	38.9%
2011 Q2	14,484	5,523	2,173	6,788	38.1%
2011 Q3	14,027	5,485	2,130	6,412	39.1%
2011 Q4	14,123	5,509	2,170	6,444	39.0%
2012 Q1	14,204	5,595	2,153	6,456	39.4%
International calls					
2010	4,850	1,053	284	3,513	21.7%
2011	4,672	890	261	3,521	19.0%
2011 Q1	1,291	245	68	978	19.0%
2011 Q2	1,244	232	66	946	18.7%
2011 Q3	1,073	210	63	800	19.6%
2011 Q4	1,066	203	64	799	19.1%
2012 Q1	1,066	198	62	806	18.6%
Calls to mobiles					
2010	5,642	2,324	648	2,670	41.2%
2011	4,705	1,852	528	2,325	39.4%
2011 Q1	1,244	485	137	622	39.0%
2011 Q2	1,210	467	133	610	38.6%
2011 Q3	1,149	463	131	555	40.3%
2011 Q4	1,101	437	127	537	39.7%
2012 Q1	1,061	419	119	523	39.5%
Other calls*					
2010	14,736	7,192	2,505	5,039	48.8%
2011	12,794	5,794	2,135	4,865	45.3%
2011 Q1	3,325	1,579	570	1,176	47.5%
2011 Q2	3,187	1,446	537	1,204	45.4%
2011 Q3	3,242	1,448	534	1,260	44.7%
2011 Q4	3,040	1,321	494	1,225	43.4%
2012 Q1	2,991	1,271	494	1,226	42.5%

[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 11
Summary of business network access & call revenues by operator (£millions)

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2010	3,197	1,609	103	1,485	50.3%
2011	2,999	1,531	97	1,370	51.1%
2011 Q1	793	399	26	367	50.4%
2011 Q2	760	390	24	346	51.3%
2011 Q3	726	370	24	332	51.0%
2011 Q4	721	372	24	325	51.6%
2012 Q1	703	360	24	318	51.3%
Access					
2010	1,743	1,140	39	564	65.4%
2011	1,768	1,130	41	598	63.9%
2011 Q1	464	292	10	161	63.0%
2011 Q2	448	287	10	151	64.1%
2011 Q3	422	271	10	141	64.2%
2011 Q4	434	279	10	144	64.4%
2012 Q1	418	266	11	141	63.7%
Calls[1]					
2010	1,453	469	64	921	32.3%
2011	1,231	402	57	773	32.6%
2011 Q1	329	107	15	206	32.6%
2011 Q2	312	103	14	195	33.1%
2011 Q3	303	99	14	191	32.6%
2011 Q4	287	92	14	181	32.2%
2012 Q1	285	95	14	177	33.1%

[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
2010	9,658	4,980	627	4,052	51.6%
2011	9,381	4,627	593	4,160	49.3%
2011 Q1	9,647	4,858	619	4,170	50.4%
2011 Q2	9,549	4,827	598	4,124	50.5%
2011 Q3	9,477	4,720	586	4,171	49.8%
2011 Q4	9,381	4,627	593	4,160	49.3%
2012 Q1	9,157	4,547	524	4,086	49.7%

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]
2010	39,728	13,531	2,201	8,375	15,621	34.1%
2011	36,321	12,182	2,076	8,213	13,850	33.5%
2011 Q1	9,545	3,238	542	2,076	3,689	33.9%
2011 Q2	9,030	3,005	498	2,036	3,491	33.3%
2011 Q3	9,073	3,039	514	2,099	3,420	33.5%
2011 Q4	8,673	2,900	522	2,002	3,250	33.4%
2012 Q1	8,766	3,003	555	2,067	3,141	34.3%

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

Table 14

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2010	1,453	393	181	628	252
2011	1,231	339	162	535	195
2011 Q1	329	89	42	146	52
2011 Q2	312	86	41	136	49
2011 Q3	303	84	40	130	49
2011 Q4	287	79	39	124	45
2012 Q1	285	78	39	122	46

[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						
2010	23,229	7,482	1,453	4,894	9,400	32.2%
2011	20,973	6,732	1,341	4,770	8,130	32.1%
2011 Q1	5,551	1,811	354	1,207	2,179	32.6%
2011 Q2	5,229	1,662	321	1,184	2,062	31.8%
2011 Q3	5,212	1,670	331	1,216	1,995	32.0%
2011 Q4	4,980	1,589	335	1,162	1,894	31.9%
2012 Q1	4,995	1,650	352	1,211	1,782	33.0%
International calls						
2010	2,346	551	44	923	828	23.5%
2011	2,182	496	41	845	800	22.7%
2011 Q1	567	137	11	210	209	24.2%
2011 Q2	546	127	12	208	199	23.2%
2011 Q3	540	119	9	214	198	22.1%
2011 Q4	529	113	9	213	194	21.4%
2012 Q1	527	120	10	208	189	22.8%
Calls to mobiles						
2010	6,205	2,214	327	956	2,707	35.7%
2011	5,718	2,071	320	970	2,356	36.2%
2011 Q1	1,492	540	82	242	628	36.2%
2011 Q2	1,419	508	76	237	598	35.8%
2011 Q3	1,433	523	80	249	581	36.5%
2011 Q4	1,374	500	82	242	549	36.4%
2012 Q1	1,405	531	90	252	532	37.8%
Other calls*						
2010	7,948	3,284	377	1,602	2,684	41.3%
2011	7,449	2,883	374	1,628	2,563	38.7%
2011 Q1	1,935	750	95	416	673	38.8%
2011 Q2	1,836	708	89	407	632	38.6%
2011 Q3	1,888	727	94	420	646	38.5%
2011 Q4	1,790	698	96	385	612	39.0%
2012 Q1	1,840	702	103	397	638	38.2%

[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 16

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

	Total	Non-LLU ADSL	LLU ADSL	Cable	Other (inc. FTTx)	BT retail share
2010	19,130	7,484	7,489	4,028	130	28.2%
2011	20,438	7,960	7,946	4,120	412	29.3%
2011 Q1	19,452	7,587	7,608	4,078	179	28.5%
2011 Q2	19,781	7,929	7,580	4,065	207	28.7%
2011 Q3	20,052	7,939	7,725	4,090	298	29.1%
2011 Q4	20,438	7,960	7,946	4,120	412	29.3%
2012 Q1	20,890	7,910	8,263	4,165	552	29.3%

[1] Figures exclude corporate broadband connections. Connection numbers have been adjusted to exclude corporate broadband based on Ofcom estimates.

3. Mobile telecoms market data tables

Q1 2012 (January to March 2012)

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 (£millions)

	Total	Access and bundled services	UK fixed calls	On-net mobile calls	Off-net mobile calls	Int'l calls	Other calls	Data services
2010	14,913	6,415	638	607	1,228	353	1,355	1,731
2011	15,060	6,582	563	526	1,062	352	1,422	2,038
2011 Q1	3,660	1,619	142	138	258	86	324	459
2011 Q2	3,751	1,617	140	131	268	89	367	522
2011 Q3	3,858	1,664	139	130	270	92	397	533
2011 Q4	3,792	1,681	141	127	266	85	335	525
2012 Q1	3,711	1,706	134	115	248	82	328	525

Table 2
Call and message volumes by call type (millions of minutes/messages)

	All calls	UK fixed calls	On-net mobile calls	Off-net mobile calls	Int'l calls	Calls when roaming	Other calls	SMS and MMS msgs
2010	124,947	31,999	44,528	38,074	2,051	1,877	6,419	129,012
2011	123,561	31,397	41,585	40,873	2,086	1,841	5,778	151,270
2011 Q1	31,016	7,988	10,985	9,556	518	414	1,553	36,934
2011 Q2	30,730	7,811	10,215	10,340	522	477	1,365	36,952
2011 Q3	30,890	7,849	10,107	10,443	532	568	1,392	37,514
2011 Q4	30,925	7,749	10,278	10,535	514	382	1,469	39,869
2012 Q1	31,109	7,863	10,279	10,700	556	358	1,352	38,947

Table 3
Subscriber numbers by type (000's)

	Conns during period	Total subs at end of period	Post-pay subs at end of period	Pre-pay subs at end of period	Proportion post-pay	Mobile b'band subs at end of period[1]
2010	33,472	81,165	37,126	44,039	45.7%	4,818
2011	30,970	81,612	40,162	41,449	49.2%	5,056
2011 Q1	7,338	81,126	37,573	43,553	46.3%	4,919
2011 Q2	7,476	81,234	38,535	42,698	47.4%	4,971
2011 Q3	7,854	81,431	39,073	42,358	48.0%	5,046
2011 Q4	8,303	81,612	40,162	41,449	49.2%	5,056
2012 Q1	7,327	81,366	40,934	40,432	50.3%	4,995

[1] Refers to datacard and dongle connections (i.e. excludes mobile phone subscriptions); figures include estimates of T-Mobile mobile broadband subscribers.
Note: Table includes estimates where Ofcom does not receive data from some MVNO providers.

Table 4
Average monthly retail revenue per subscriber (£ per month)

	All subscribers	Post-pay	Pre-pay
2010	15.47	26.24	6.86
2011	15.43	25.14	6.56
2011 Q1	15.04	25.29	6.29
2011 Q2	15.40	25.47	6.51
2011 Q3	15.81	25.86	6.64
2011 Q4	15.51	24.92	6.61
2012 Q1	15.18	24.40	6.05

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

Table 5
Interconnection call volumes (millions of minutes)

	All operators
2010	56,177
2011	59,007
2011 Q1	14,500
2011 Q2	14,718
2011 Q3	14,857
2011 Q4	14,932
2012 Q1	14,590

Note: Shows the number of call minutes terminating on the mobile networks.