Telecommunications market data tables Q4 2012

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1. Market monitor

This report was reissued on 9 May 2013 with restatements to the broadband connection figures in Table 16 in the fixed telecoms section of the report (page 17).

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

The fixed telecoms tables in this report include restated figures for ‘other indirect’ call minutes and revenues. These figures have been restated as a result of revisions to our estimates for ‘other indirect’ calls originated by those fixed telephony providers that do not provide regular quarterly data to Ofcom.

Fixed voice

- UK fixed telephony services generated £2.1bn in retail revenues in Q4 2012, £93m (4.2%) less than in Q4 2011. BT’s market share of these revenues 45.7%, 2.6 percentage points less than it had been a year previously.
- There were 33.1 million fixed lines at the end of Q4 2012, 107,000 (0.3%) less than a year previously and 135,000 (0.4%) up on the previous quarter.
- There were 25.1 billion minutes of fixed-originated calls in Q4 2012, 1.9 billion minutes (7.0%) less than in Q4 2011. Over the same period BT’s share of fixed-originated call volumes decreased by 0.1 percentage points to 38.5%.

Fixed broadband

- There were 21.7 million UK residential and SME fixed broadband connections at the end of Q4 2012, 1.1 million (5.4%) more than there had been a year previously.
- BT’s retail share of these connections was 29.6% in Q4 2012, 0.5 percentage points higher than it was in Q4 2011.
- There were more than a million ‘other’ (predominantly fibre-based) fixed broadband connections for the first time during the period. At the end of December 2012 there were 1.1 million ‘other’ connections (5.1% of the total), up from 416,000 (2.0%) a year previously.

Mobile

- Estimated retail revenues generated by mobile telephony increased by 0.8% in 2012 to £15.2bn, though the fourth-quarter figure declined 0.3% compared with the same quarter one year previously. The two major areas of growth were ‘Access and bundled services’ and ‘Data services’: these increased by 5.8% and 16.8% respectively in 2012 in terms of full-year figures.
- 2012 became the second consecutive year of decline in call volumes with a decline of 1.0%, slightly smaller than the annual decline in 2011 of 1.1%. Mobile-to-fixed

and mobile-to-mobile voice call volumes have each declined for two consecutive years, with the former declining 2.0% and the latter declining 0.7% in 2012.

- In Q4 2012, the volume of SMS messages sent was 6.4% lower than the same quarter the year before, at 37.3bn messages. Q4 2011 saw the largest volume of SMS messages sent in one quarter. There was an increase of 0.7% in 2012 as a whole, with 152.3bn messages being sent.

- From Q3 2012 to Q4 2012, the number of active mobile subscribers increased 0.7% to 82.675m, a new high. The increase from Q4 2011 was 1.3%. The number of active mobile broadband subscribers decreased 1.8% from Q3 2012 to Q4 2012, ending the year with 4.917m.

2. Fixed telecoms market data tables

Q4 2012 (October to December 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]					
2011	8,818	4,313	1,073	3,431	48.9%
2012	8,517	3,983	1,066	3,468	46.8%
2011 Q4	2,193	1,058	263	873	48.2%
2012 Q1	2,170	1,034	269	867	47.7%
2012 Q2	2,122	995	269	857	46.9%
2012 Q3	2,124	994	265	865	46.8%
2012 Q4	2,101	959	263	879	45.7%
Access					
2011	5,143	2,724	617	1,802	53.0%
2012	5,283	2,580	677	2,026	48.8%
2011 Q4	1,328	683	157	488	51.4%
2012 Q1	1,334	669	170	496	50.1%
2012 Q2	1,309	648	169	493	49.5%
2012 Q3	1,319	643	168	509	48.7%
2012 Q4	1,320	621	171	528	47.1%
Calls[1]					
2011	3,675	1,589	456	1,629	43.2%
2012	3,233	1,402	389	1,442	43.4%
2011 Q4	865	374	105	385	43.3%
2012 Q1	836	366	99	371	43.7%
2012 Q2	813	347	101	365	42.8%
2012 Q3	805	351	97	356	43.7%
2012 Q4	780	338	92	350	43.3%

Excludes VAT; [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
2011	33,252	15,750	4,893	12,610	47.4%
2012	33,145	14,503	4,838	13,803	43.8%
2011 Q4	33,252	15,750	4,893	12,610	47.4%
2012 Q1	33,292	15,443	4,703	13,146	46.4%
2012 Q2	33,198	15,121	4,824	13,253	45.5%
2012 Q3	33,010	14,728	4,824	13,458	44.6%
2012 Q4	33,145	14,503	4,838	13,803	43.8%

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]
2011	111,972	43,364	13,867	24,770	29,971	38.7%
2012	103,061	39,728	12,712	25,837	24,784	38.5%
2011 Q4	26,923	10,386	3,377	6,133	7,027	38.6%
2012 Q1	27,061	10,502	3,383	6,509	6,666	38.8%
2012 Q2	25,783	9,923	3,159	6,374	6,327	38.5%
2012 Q3	25,187	9,678	3,089	6,341	6,078	38.4%
2012 Q4	25,030	9,625	3,081	6,613	5,712	38.5%

[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]
2011	3,675	1,088	379	1,229	978
2012	3,233	987	329	1,031	887
2011 Q4	865	259	90	285	231
2012 Q1	836	252	87	272	225
2012 Q2	813	244	83	261	225
2012 Q3	805	247	82	254	221
2012 Q4	780	243	78	243	217

Excludes VAT; [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						
2011	74,566	29,302	10,208	16,353	18,703	39.3%
2012	68,877	27,162	9,387	17,167	15,162	39.4%
2011 Q4	18,049	7,098	2,505	4,015	4,432	39.3%
2012 Q1	18,220	7,245	2,505	4,357	4,113	39.8%
2012 Q2	17,213	6,746	2,321	4,280	3,866	39.2%
2012 Q3	16,735	6,564	2,268	4,239	3,663	39.2%
2012 Q4	16,709	6,607	2,293	4,290	3,519	39.5%
International calls						
2011	6,470	1,386	302	2,779	2,003	21.4%
2012	5,848	1,176	275	2,626	1,771	20.1%
2011 Q4	1,506	316	73	703	415	21.0%
2012 Q1	1,508	318	72	644	475	21.1%
2012 Q2	1,509	298	70	664	477	19.7%
2012 Q3	1,462	277	65	646	475	18.9%
2012 Q4	1,369	283	68	673	345	20.7%
Calls to mobiles						
2011	10,346	3,922	848	1,786	3,790	37.9%
2012	9,387	3,622	801	1,860	3,105	38.6%
2011 Q4	2,457	936	209	432	880	38.1%
2012 Q1	2,445	950	209	451	836	38.8%
2012 Q2	2,361	909	198	458	796	38.5%
2012 Q3	2,321	899	198	468	756	38.7%
2012 Q4	2,260	864	196	484	717	38.2%
Other calls[1]						
2011	20,591	8,754	2,509	3,853	5,475	42.5%
2012	18,948	7,768	2,249	4,185	4,746	41.0%
2011 Q4	4,910	2,036	590	984	1,301	41.5%
2012 Q1	4,886	1,989	597	1,058	1,243	40.7%
2012 Q2	4,701	1,970	570	972	1,189	41.9%
2012 Q3	4,669	1,938	558	989	1,184	41.5%
2012 Q4	4,692	1,871	524	1,166	1,131	39.9%

[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]					
2011	5,816	2,741	976	2,099	47.1%
2012	5,787	2,544	976	2,267	44.0%
2011 Q4	1,471	676	239	556	46.0%
2012 Q1	1,467	665	244	558	45.3%
2012 Q2	1,438	639	246	552	44.5%
2012 Q3	1,440	628	242	569	43.6%
2012 Q4	1,442	612	243	588	42.4%
Access					
2011	3,375	1,594	576	1,204	47.2%
2012	3,645	1,533	639	1,473	42.0%
2011 Q4	894	404	147	343	45.2%
2012 Q1	918	403	159	356	43.9%
2012 Q2	902	389	159	355	43.1%
2012 Q3	906	376	158	371	41.5%
2012 Q4	919	365	163	391	39.7%
Calls[1]					
2011	2,441	1,147	400	895	47.0%
2012	2,142	1,012	337	794	47.2%
2011 Q4	577	272	91	213	47.2%
2012 Q1	549	262	86	201	47.7%
2012 Q2	536	251	88	197	46.8%
2012 Q3	534	252	84	198	47.2%
2012 Q4	523	247	80	197	47.1%

Excludes VAT; [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
2011	23,872	11,123	4,299	8,449	46.6%
2012	24,353	10,341	4,322	9,691	42.5%
2011 Q4	23,872	11,123	4,299	8,449	46.6%
2012 Q1	24,046	10,896	4,179	8,972	45.3%
2012 Q2	24,189	10,697	4,304	9,188	44.2%
2012 Q3	24,136	10,414	4,305	9,417	43.1%
2012 Q4	24,353	10,341	4,322	9,691	42.5%

Table 8
Summary of residential call volumes by operator (millions of minutes)[1]

	All Operators	BT[1]	Virgin Media	Other	BT share[1]
2011	78,191	31,106	11,791	35,294	39.8%
2012	71,456	28,310	10,614	32,532	39.6%
2011 Q4	18,834	7,470	2,855	8,509	39.7%
2012 Q1	18,845	7,483	2,828	8,534	39.7%
2012 Q2	17,864	7,072	2,652	8,140	39.6%
2012 Q3	17,390	6,859	2,568	7,963	39.4%
2012 Q4	17,358	6,896	2,566	7,896	39.7%

[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]
2011	2,441	787	237	675	742
2012	2,142	722	197	565	658
2011 Q4	577	188	55	158	176
2012 Q1	549	182	51	146	170
2012 Q2	536	178	49	143	165
2012 Q3	534	181	49	141	163
2012 Q4	523	181	48	135	160

Excludes VAT; [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					
2011	56,083	22,570	8,867	24,646	40.2%
2012	51,884	21,051	8,062	22,771	40.6%
2011 Q4	13,641	5,509	2,170	5,962	40.4%
2012 Q1	13,742	5,595	2,153	5,994	40.7%
2012 Q2	12,940	5,229	2,005	5,706	40.4%
2012 Q3	12,537	5,064	1,939	5,534	40.4%
2012 Q4	12,665	5,163	1,965	5,537	40.8%
International calls					
2011	4,570	890	261	3,419	19.5%
2012	4,107	743	239	3,125	18.1%
2011 Q4	1,042	203	64	775	19.5%
2012 Q1	1,042	198	62	782	19.0%
2012 Q2	1,049	187	60	802	17.8%
2012 Q3	1,038	178	57	803	17.1%
2012 Q4	978	180	60	738	18.4%
Calls to mobiles					
2011	4,471	1,852	528	2,091	41.4%
2012	3,899	1,598	453	1,848	41.0%
2011 Q4	1,048	437	127	484	41.7%
2012 Q1	1,010	419	119	472	41.5%
2012 Q2	982	404	113	465	41.2%
2012 Q3	966	395	111	460	40.9%
2012 Q4	941	380	110	451	40.4%
Other calls*					
2011	13,066	5,794	2,135	5,137	44.3%
2012	11,566	4,918	1,860	4,788	42.5%
2011 Q4	3,103	1,321	494	1,288	42.6%
2012 Q1	3,051	1,271	494	1,286	41.7%
2012 Q2	2,893	1,252	474	1,167	43.3%
2012 Q3	2,848	1,222	461	1,165	42.9%
2012 Q4	2,773	1,173	431	1,169	42.3%

[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]					
2011	2,961	1,531	97	1,333	51.7%
2012	2,693	1,402	90	1,201	52.1%
2011 Q4	712	372	24	317	52.2%
2012 Q1	694	360	24	309	51.9%
2012 Q2	675	347	23	305	51.4%
2012 Q3	675	357	23	296	52.8%
2012 Q4	649	338	20	291	52.1%
Access					
2011	1,768	1,130	41	598	63.9%
2012	1,639	1,048	38	553	64.0%
2011 Q4	434	279	10	144	64.4%
2012 Q1	417	266	11	140	63.8%
2012 Q2	407	259	10	138	63.7%
2012 Q3	414	267	10	138	64.4%
2012 Q4	401	256	8	137	63.8%
Calls[1]					
2011	1,193	402	57	735	33.7%
2012	1,055	354	52	648	33.6%
2011 Q4	278	92	14	172	33.2%
2012 Q1	278	95	14	170	34.0%
2012 Q2	268	88	13	167	32.7%
2012 Q3	261	90	13	158	34.5%
2012 Q4	248	82	12	153	33.2%

Excludes VAT; [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
2011	9,381	4,627	593	4,160	49.3%
2012	8,792	4,162	517	4,113	47.3%
2011 Q4	9,381	4,627	593	4,160	49.3%
2012 Q1	9,246	4,547	524	4,175	49.2%
2012 Q2	9,009	4,425	520	4,065	49.1%
2012 Q3	8,874	4,314	519	4,041	48.6%
2012 Q4	8,792	4,162	517	4,113	47.3%

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]
2011	33,706	12,182	2,076	8,213	11,235	36.1%
2012	31,543	11,354	2,098	8,486	9,605	36.0%
2011 Q4	8,073	2,900	522	2,002	2,649	35.9%
2012 Q1	8,201	3,003	555	2,071	2,572	36.6%
2012 Q2	7,906	2,836	507	2,120	2,443	35.9%
2012 Q3	7,781	2,803	521	2,087	2,370	36.0%
2012 Q4	7,656	2,712	515	2,208	2,221	35.4%

[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]
2011	1,193	302	143	554	195
2012	1,055	265	132	466	193
2011 Q4	278	71	34	128	45
2012 Q1	278	70	36	126	46
2012 Q2	268	66	33	118	51
2012 Q3	261	66	33	114	49
2012 Q4	248	62	30	108	48

Excludes VAT; [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						
2011	18,483	6,732	1,341	4,770	5,640	36.4%
2012	16,994	6,110	1,325	4,893	4,666	36.0%
2011 Q4	4,408	1,589	335	1,162	1,322	36.0%
2012 Q1	4,480	1,650	352	1,214	1,264	36.8%
2012 Q2	4,273	1,517	316	1,238	1,202	35.5%
2012 Q3	4,198	1,500	329	1,230	1,139	35.7%
2012 Q4	4,043	1,443	328	1,210	1,062	35.7%
International calls						
2011	1,899	496	41	845	517	26.1%
2012	1,742	433	36	878	394	24.9%
2011 Q4	464	113	9	213	129	24.4%
2012 Q1	466	120	10	210	127	25.7%
2012 Q2	461	111	10	231	108	24.1%
2012 Q3	424	99	8	220	97	23.4%
2012 Q4	391	103	8	218	62	26.4%
Calls to mobiles						
2011	5,875	2,071	320	970	2,514	35.2%
2012	5,488	2,024	348	1,024	2,093	36.9%
2011 Q4	1,410	500	82	242	586	35.5%
2012 Q1	1,436	531	90	250	565	37.0%
2012 Q2	1,379	505	85	253	536	36.6%
2012 Q3	1,355	504	87	255	509	37.2%
2012 Q4	1,319	484	86	267	482	36.7%
Other calls*						
2011	7,449	2,883	374	1,628	2,563	38.7%
2012	7,320	2,787	389	1,692	2,452	38.1%
2011 Q4	1,790	698	96	385	612	39.0%
2012 Q1	1,819	702	103	398	616	38.6%
2012 Q2	1,793	703	96	398	596	39.2%
2012 Q3	1,805	700	97	383	625	38.8%
2012 Q4	1,903	682	93	513	615	35.8%

[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
2011	20,571	8,089	7,946	4,120	416	29.1%
2012	21,680	7,512	8,777	4,290	1,101	29.6%
2011 Q4	20,571	8,089	7,946	4,120	416	29.1%
2012 Q1	20,923	7,945	8,263	4,165	550	29.3%
2012 Q2	21,093	7,925	8,399	4,168	601	29.4%
2012 Q3	21,324	7,744	8,558	4,225	797	29.5%
2012 Q4	21,680	7,512	8,777	4,290	1,101	29.6%

[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

Q4 2012 (October to December 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
2011	15,061	6,582	563	526	1,062	352	1,422	2,038
2012	15,178	6,964	555	433	905	353	1,353	2,379
2011 Q4	3,792	1,681	141	127	266	85	335	525
2012 Q1	3,748	1,706	134	115	248	82	328	555
2012 Q2	3,799	1,723	145	113	235	85	339	589
2012 Q3	3,852	1,753	140	108	222	90	358	617
2012 Q4	3,779	1,783	135	97	200	95	328	619

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
2011	123,561	31,397	41,585	40,873	2,086	1,841	5,778	151,271
2012	122,323	30,772	39,012	42,838	2,234	1,651	5,816	152,319
2011 Q4	30,925	7,749	10,278	10,535	514	382	1,469	39,870
2012 Q1	31,109	7,863	10,279	10,700	556	358	1,352	39,248
2012 Q2	30,607	7,663	9,808	10,709	594	424	1,408	38,702
2012 Q3	30,445	7,742	9,583	10,611	547	508	1,454	37,056
2012 Q4	30,162	7,503	9,342	10,816	537	361	1,602	37,313

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]
2011	30,970	81,612	40,162	41,449	49.2%	5,056
2012	30,162	82,675	43,717	38,959	52.9%	4,917
2011 Q4	8,303	81,612	40,162	41,449	49.2%	5,056
2012 Q1	7,371	81,366	40,934	40,432	50.3%	5,015
2012 Q2	7,189	81,723	41,740	39,983	51.1%	4,989
2012 Q3	7,649	82,109	42,744	39,365	52.1%	5,007
2012 Q4	7,953	82,675	43,717	38,959	52.9%	4,917

[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
2011	15.43	25.14	6.56
2012	15.43	24.11	6.19
2011 Q4	15.51	24.92	6.61
2012 Q1	15.33	24.62	6.12
2012 Q2	15.53	24.53	6.27
2012 Q3	15.67	24.55	6.23
2012 Q4	15.29	23.76	5.94

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
2011	59,007
2012	59,152
2011 Q4	14,932
2012 Q1	14,590
2012 Q2	14,763
2012 Q3	14,713
2012 Q4	15,086

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