Telecommunications market data tables Q3 2012

Published: **31 January 2013**

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

- Retail fixed voice telephony services generated £2.1bn in revenues in Q3 2012, £61m (2.8%) less than in Q3 2011. Over this period a £103m (11.1%) fall in call revenues was offset by a £42m (3.3%) increase in access revenues.
- There were 26.1 billion minutes of fixed originated calls in Q3 2012, 2.5 billion minutes (8.7%) less than in Q3 2011. BT's retail share of these calls was 37.1% in Q3 2012, unchanged from the previous quarter and 0.2 percentage points less than in Q3 2011.
- At the end of Q3 2012 there were a total of 33.0 million analogue lines and ISDN channels, 223,000 (0.7%) less than there had been at the end of Q3 2011. BT's retail share of these lines was 44.6% at the end of Q3 2012, 3.6 percentage points less than it had been a year previously.

Fixed broadband

- There were 21.4 million fixed broadband connections at the end of Q3 2012, 1.3 million (6.5%) more than there had been a year previously. BT's retail share of these connections was 29.4%, unchanged from the previous quarter and 0.2 percentage points higher than it had been at the end of Q3 2011.
- The proportion of connections which were classed as being 'other' (predominantly consisting of FTTx connections) was 3.0% in Q3 2012, up from 1.5% in Q3 2011. Over the same period the proportion of connections which were provided over Virgin Media's cable network fell from 20.4% in Q3 2011 to 19.8% in Q3 2012.

Mobile

- In Q3 2012, mobile retail revenues increased 1.4% quarter-on-quarter, but decreased 0.1% compared with Q3 2011. The proportion of retail revenues attributable to access and bundled services and to out-of-bundle data both increased on a quarterly and annual basis.
- Mobile call volumes decreased 0.5% quarter-on-quarter and decreased 1.4% compared with one year earlier, in Q3 2012. The volume of SMS and MMS messages decreased by 4.3% quarter-on-quarter and 1.2% compared with one year earlier: this was a third consecutive quarterly decline.
- In Q3 2012, the number of active mobile subscribers increased 0.5% quarter-on-quarter, and increased 0.8% compared with Q3 2011. The proportion of active mobile subscribers on postpaid tariffs increased to 52.1%. The number of active mobile broadband subscribers increased 0.4% quarter-on-quarter.

2. Fixed telecoms market data tables

Q3 2012 (July to September 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 Q3	2,192	1,053	261	877	48.1%
2011 Q4	2,214	1,058	263	894	47.8%
2012 Q1	2,190	1,034	269	887	47.2%
2012 Q2	2,138	995	269	874	46.5%
2012 Q3	2,131	994	265	872	46.7%
Access					
2010	5,003	2,837	602	1,563	56.7%
2011	5,141	2,724	617	1,800	53.0%
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	1,334	669	170	495	50.1%
2012 Q2	1,306	648	169	490	49.6%
2012 Q3	1,308	643	168	497	49.1%
Calls[1]					
2010	4,404	1,877	562	1,965	42.6%
2011	3,772	1,589	456	1,726	42.1%
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	857	366	99	392	42.7%
2012 Q2	832	347	101	384	41.8%
2012 Q3	823	351	97	375	42.7%

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
2010	33,409	17,023	4,940	11,447	51.0%
2011	33,252	15,750	4,893	12,610	47.4%
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	33,292	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%

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 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	28,094	10,502	3,383	6,509	7,699	37.4%
2012 Q2	26,752	9,923	3,159	6,374	7,296	37.1%
2012 Q3	26,090	9,678	3,089	6,341	6,982	37.1%

[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 Q3	926	284	98	305	240
2011 Q4	887	274	95	289	230
2012 Q1	857	267	92	275	223
2012 Q2	832	258	87	264	223
2012 Q3	823	260	86	257	220

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						
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 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	19,212	7,245	2,505	4,357	5,105	37.7%
2012 Q2	18,143	6,746	2,321	4,280	4,796	37.2%
2012 Q3	17,603	6,564	2,268	4,239	4,531	37.3%
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 Q3	1,612	329	72	593	618	20.4%
2011 Q4	1,595	316	73	703	503	19.8%
2012 Q1	1,592	318	72	644	558	20.0%
2012 Q2	1,587	298	70	664	555	18.8%
2012 Q3	1,535	277	65	646	547	18.0%
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 Q3	2,582	986	211	435	950	38.2%
2011 Q4	2,474	936	209	432	897	37.8%
2012 Q1	2,462	950	209	451	852	38.6%
2012 Q2	2,376	909	198	458	811	38.3%
2012 Q3	2,335	899	198	468	771	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 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	4,828	1,989	597	1,058	1,184	41.2%
2012 Q2	4,646	1,970	570	972	1,134	42.4%
2012 Q3	4,618	1,938	558	989	1,133	42.0%

[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 Q3	1,455	673	238	545	46.2%
2011 Q4	1,483	676	239	568	45.6%
2012 Q1	1,479	665	244	569	45.0%
2012 Q2	1,447	639	246	561	44.2%
2012 Q3	1,440	628	242	569	43.6%
Access					
2010	3,259	1,697	563	999	52.1%
2011	3,373	1,594	576	1,202	47.3%
2011 Q3	844	395	139	310	46.8%
2011 Q4	893	404	147	342	45.2%
2012 Q1	917	403	159	356	43.9%
2012 Q2	899	389	159	352	43.2%
2012 Q3	894	376	158	360	42.1%
Calls[1]					
2010	2,901	1,358	498	1,045	46.8%
2011	2,500	1,147	400	953	45.9%
2011 Q3	612	278	98	235	45.5%
2011 Q4	590	272	91	227	46.1%
2012 Q1	562	262	86	214	46.7%
2012 Q2	548	251	88	209	45.8%
2012 Q3	545	252	84	209	46.2%

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

Table 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 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	24,046	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%

Table 8

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

	All Operators	BT[1]	Virgin Media	Other	BT share[1]
2010	90,357	36,189	13,632	40,536	40.1%
2011	80,353	31,106	11,791	37,456	38.7%
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	19,312	7,483	2,828	9,001	38.7%
2012 Q2	18,302	7,072	2,652	8,578	38.6%
2012 Q3	17,799	6,859	2,568	8,372	38.5%

[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 Q3	612	199	58	174	180
2011 Q4	590	195	56	165	174
2012 Q1	562	189	52	153	168
2012 Q2	548	184	50	150	164
2012 Q3	545	187	50	147	162

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					
2010	65,134	25,620	10,195	29,319	39.3%
2011	58,182	22,570	8,867	26,745	38.8%
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	14,195	5,595	2,153	6,447	39.4%
2012 Q2	13,366	5,229	2,005	6,132	39.1%
2012 Q3	12,934	5,064	1,939	5,931	39.2%
International calls					
2010	4,846	1,053	284	3,509	21.7%
2011	4,672	890	261	3,521	19.0%
2011 Q3	1,073	210	63	800	19.6%
2011 Q4	1,066	203	64	799	19.1%
2012 Q1	1,064	198	62	804	18.6%
2012 Q2	1,069	187	60	822	17.5%
2012 Q3	1,057	178	57	822	16.8%
Calls to mobiles					
2010	5,642	2,324	648	2,670	41.2%
2011	4,705	1,852	528	2,325	39.4%
2011 Q3	1,149	463	131	555	40.3%
2011 Q4	1,101	437	127	537	39.7%
2012 Q1	1,060	419	119	522	39.5%
2012 Q2	1,029	404	113	512	39.3%
2012 Q3	1,011	395	111	505	39.1%
Other calls*					
2010	14,735	7,192	2,505	5,038	48.8%
2011	12,794	5,794	2,135	4,865	45.3%
2011 Q3	3,242	1,448	534	1,260	44.7%
2011 Q4	3,040	1,321	494	1,225	43.4%
2012 Q1	2,993	1,271	494	1,228	42.5%
2012 Q2	2,838	1,252	474	1,112	44.1%
2012 Q3	2,797	1,222	461	1,114	43.7%

[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	1,371	51.1%
2011 Q3	726	370	24	332	51.0%
2011 Q4	721	372	24	325	51.6%
2012 Q1	703	360	24	318	51.3%
2012 Q2	683	347	23	313	50.8%
2012 Q3	682	357	23	303	52.3%
Access					
2010	1,743	1,140	39	564	65.4%
2011	1,768	1,130	41	598	63.9%
2011 Q3	422	271	10	141	64.2%
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%
Calls[1]					
2010	1,454	469	64	921	32.3%
2011	1,231	402	57	773	32.6%
2011 Q3	304	99	14	191	32.6%
2011 Q4	287	92	14	181	32.1%
2012 Q1	286	95	14	178	33.0%
2012 Q2	275	88	13	175	31.8%
2012 Q3	268	90	13	165	33.5%

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
2010	9,658	4,980	627	4,052	51.6%
2011	9,381	4,627	593	4,160	49.3%
2011 Q3	9,477	4,720	586	4,171	49.8%
2011 Q4	9,381	4,627	593	4,160	49.3%
2012 Q1	9,246	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%

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	39,733	13,531	2,201	8,375	15,626	34.1%
2011	36,321	12,182	2,076	8,213	13,850	33.5%
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	2,071	3,137	34.3%
2012 Q2	8,436	2,836	507	2,120	2,973	33.6%
2012 Q3	8,276	2,803	521	2,087	2,864	33.9%

[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	1,454	393	181	628	252
2011	1,231	339	162	535	195
2011 Q3	304	84	40	130	49
2011 Q4	287	79	39	124	45
2012 Q1	286	78	40	122	46
2012 Q2	275	74	37	114	51
2012 Q3	268	74	36	110	49

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						
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 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	5,018	1,650	352	1,214	1,802	32.9%
2012 Q2	4,778	1,517	316	1,238	1,707	31.8%
2012 Q3	4,669	1,500	329	1,230	1,610	32.1%
International calls						
2010	2,350	551	44	923	832	23.4%
2011	2,182	496	41	845	800	22.7%
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	528	120	10	210	188	22.7%
2012 Q2	518	111	10	231	165	21.4%
2012 Q3	477	99	8	220	151	20.7%
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 Q3	1,433	523	80	249	581	36.5%
2011 Q4	1,374	500	82	242	549	36.4%
2012 Q1	1,402	531	90	250	531	37.9%
2012 Q2	1,347	505	85	253	504	37.5%
2012 Q3	1,325	504	87	255	479	38.0%
Other calls*						
2010	7,949	3,284	377	1,602	2,685	41.3%
2011	7,449	2,883	374	1,628	2,563	38.7%
2011 Q3	1,888	727	94	420	646	38.5%
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%

[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	19,134	7,486	7,489	4,028	131	28.1%
2011	20,440	7,959	7,946	4,120	416	29.3%
2011 Q3	20,059	7,943	7,725	4,090	301	29.1%
2011 Q4	20,440	7,959	7,946	4,120	416	29.3%
2012 Q1	20,905	7,928	8,263	4,165	550	29.3%
2012 Q2	21,107	7,939	8,399	4,168	601	29.4%
2012 Q3	21,371	7,949	8,558	4,225	639	29.4%

[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

Q3 2012 (July to September 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	15,061	6,582	563	526	1,062	352	1,422	2,038
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	3,748	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

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	129,014
2011	123,561	31,397	41,585	40,873	2,086	1,841	5,778	151,271
2011 Q3	30,890	7,849	10,107	10,443	532	568	1,392	37,515
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

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 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	7,371	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	7,628	82,109	42,744	39,365	52.1%	5,007

[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 Q3	15.81	25.86	6.64
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

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 Q3	14,857
2011 Q4	14,932
2012 Q1	14,590
2012 Q2	14,763
2012 Q3	14,713

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