

Telecommunications market data tables

Q3 2009

1 – Market monitor

2 – Fixed telecoms market data tables

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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 voice

- Total fixed line revenues were £2.21bn in Q3 2009, down 2.8% on Q3 2008.
- At 33.2 billion minutes in Q3 2009, total fixed call volumes were 5.7% lower than in the corresponding quarter in 2008.
- The total number of fixed lines (including ISDN channels) fell by 117k (0.4%) in Q3 2009 to 32.7 million, 588k less than a year earlier.

Fixed broadband

- The total number of residential and SME broadband connections grew by 195k (1.1%) to 17.9 million during the quarter, up from 16.9 million a year previously.
- BT Retail remained the largest UK residential and SME broadband provider during the period, with its market share growing by 0.1 percentage points to 26.7%.

Mobile¹

- Total revenue fell by 5.1% across the UK's four largest operators between Q3 2008 and Q3 2009, slightly less than the annual decline in the previous quarter (-5.5%). Messaging services revenue was 7% lower than in Q3 2008 while revenues from calls and other charges fell by 5%.
- Total call volumes across the four operators increased by 4.9% year-on-year to 26.5 billion minutes in Q3 2009. Roaming call volumes were 1.3% lower than in Q3 2008 while calls to international destinations were up by 8.5% over the 12-month period.
- Total messaging volumes reached 22.9 billion in Q3 2009, equivalent to 333 messages per subscriber; this compares to 18.5 billion or 273 messages per subscriber in Q3 2008.
- The number of active mobile subscriptions reached 69.2 million in Q3 2009, 1.4% higher than in the previous quarter (and also 1.4% higher than in Q3 2008). The proportion of post-pay subscribers rose to 39.5% of total subscribers in Q3 2009, reflecting an increase of 2.2 million post-pay subscribers since Q3 2008, compared to a 1.2 million decline in subscribers to pre-pay.

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

2. Fixed telecoms market data tables

2009 Q3 (July to September 2009)

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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 & Calls¹ | | | | | |
| 2007 | 9,493 | 5,870 | 1,207 | 2,416 | 61.8% |
| 2008 | 9,228 | 5,436 | 1,175 | 2,617 | 58.9% |
| 2008 Q3 | 2,279 | 1,333 | 290 | 656 | 58.5% |
| 2008 Q4 | 2,268 | 1,314 | 289 | 665 | 58.0% |
| 2009 Q1 | 2,220 | 1,259 | 289 | 672 | 56.7% |
| 2009 Q2 | 2,265 | 1,290 | 285 | 691 | 56.9% |
| 2009 Q3 | 2,214 | 1,214 | 286 | 714 | 54.8% |
| Access | | | | | |
| 2007 | 4,618 | 3,144 | 579 | 895 | 68.1% |
| 2008 | 4,672 | 3,044 | 571 | 1,057 | 65.2% |
| 2008 Q3 | 1,165 | 755 | 142 | 268 | 64.8% |
| 2008 Q4 | 1,163 | 740 | 143 | 280 | 63.6% |
| 2009 Q1 | 1,130 | 717 | 144 | 269 | 63.4% |
| 2009 Q2 | 1,171 | 743 | 144 | 284 | 63.4% |
| 2009 Q3 | 1,132 | 689 | 144 | 300 | 60.9% |
| Calls¹ | | | | | |
| 2007 | 4,875 | 2,726 | 628 | 1,521 | 55.9% |
| 2008 | 4,556 | 2,392 | 604 | 1,560 | 52.5% |
| 2008 Q3 | 1,113 | 577 | 148 | 389 | 51.8% |
| 2008 Q4 | 1,105 | 575 | 146 | 385 | 52.0% |
| 2009 Q1 | 1,089 | 542 | 144 | 403 | 49.7% |
| 2009 Q2 | 1,094 | 547 | 140 | 406 | 50.0% |
| 2009 Q3 | 1,082 | 525 | 142 | 414 | 48.6% |

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 | 33,462 | 22,245 | 4,524 | 6,692 | 66.5% |
| 2008 | 33,235 | 20,567 | 4,605 | 8,064 | 61.9% |
| 2008 Q3 | 33,258 | 21,035 | 4,552 | 7,670 | 63.2% |
| 2008 Q4 | 33,235 | 20,567 | 4,605 | 8,064 | 61.9% |
| 2009 Q1 | 33,125 | 20,007 | 4,606 | 8,512 | 60.4% |
| 2009 Q2 | 32,786 | 19,280 | 4,597 | 8,909 | 58.8% |
| 2009 Q3 | 32,670 | 18,742 | 4,609 | 9,319 | 57.4% |

Table 3**Summary of call volumes by operator (millions of minutes)¹**

| | All Operators | BT¹ | Virgin Media | Other Direct Access | Other Indirect Access | BT share¹ |
|---------|----------------------|-----------------------|---------------------|----------------------------|------------------------------|-----------------------------|
| 2007 | 161,275 | 82,218 | 22,869 | 13,972 | 42,216 | 51.0% |
| 2008 | 144,039 | 67,152 | 19,272 | 16,984 | 40,631 | 46.6% |
| 2008 Q3 | 35,242 | 16,196 | 4,690 | 4,473 | 9,883 | 46.0% |
| 2008 Q4 | 34,631 | 15,691 | 4,727 | 4,397 | 9,815 | 45.3% |
| 2009 Q1 | 34,955 | 15,407 | 4,661 | 4,512 | 10,374 | 44.1% |
| 2009 Q2 | 33,188 | 13,942 | 4,238 | 4,355 | 10,653 | 42.0% |
| 2009 Q3 | 33,227 | 13,684 | 4,238 | 4,261 | 11,044 | 41.2% |

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 | 1,443 | 809 | 184 | 450 | 56.1% |
| 2008 | 1,368 | 753 | 161 | 454 | 55.0% |
| 2008 Q3 | 337 | 185 | 39 | 112 | 55.0% |
| 2008 Q4 | 336 | 185 | 39 | 112 | 55.2% |
| 2009 Q1 | 342 | 183 | 41 | 118 | 53.6% |
| 2009 Q2 | 336 | 180 | 39 | 118 | 53.4% |
| 2009 Q3 | 335 | 174 | 41 | 119 | 52.0% |
| International calls | | | | | |
| 2007 | 563 | 279 | 45 | 239 | 49.5% |
| 2008 | 554 | 252 | 53 | 250 | 45.4% |
| 2008 Q3 | 133 | 59 | 13 | 62 | 44.2% |
| 2008 Q4 | 134 | 60 | 13 | 61 | 44.5% |
| 2009 Q1 | 133 | 57 | 12 | 64 | 42.8% |
| 2009 Q2 | 129 | 53 | 12 | 64 | 41.3% |
| 2009 Q3 | 128 | 51 | 12 | 65 | 39.8% |
| Calls to mobiles | | | | | |
| 2007 | 1,631 | 803 | 222 | 606 | 49.2% |
| 2008 | 1,530 | 718 | 220 | 592 | 46.9% |
| 2008 Q3 | 377 | 175 | 54 | 149 | 46.3% |
| 2008 Q4 | 367 | 172 | 51 | 144 | 46.9% |
| 2009 Q1 | 364 | 167 | 49 | 148 | 45.9% |
| 2009 Q2 | 358 | 163 | 49 | 147 | 45.4% |
| 2009 Q3 | 358 | 159 | 48 | 150 | 44.6% |
| Other calls¹ | | | | | |
| 2007 | 1,238 | 835 | 176 | 227 | 67.5% |
| 2008 | 1,103 | 669 | 170 | 264 | 60.7% |
| 2008 Q3 | 266 | 158 | 42 | 66 | 59.5% |
| 2008 Q4 | 268 | 157 | 43 | 68 | 58.8% |
| 2009 Q1 | 250 | 134 | 42 | 73 | 53.7% |
| 2009 Q2 | 270 | 152 | 41 | 77 | 56.1% |
| 2009 Q3 | 261 | 141 | 41 | 80 | 53.8% |

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 | 96,094 | 46,133 | 14,434 | 8,686 | 26,840 | 48.0% |
| 2008 | 91,892 | 41,345 | 13,732 | 10,792 | 26,023 | 45.0% |
| 2008 Q3 | 22,424 | 10,014 | 3,288 | 2,823 | 6,299 | 44.7% |
| 2008 Q4 | 22,551 | 9,998 | 3,400 | 2,803 | 6,349 | 44.3% |
| 2009 Q1 | 22,958 | 9,903 | 3,390 | 2,901 | 6,764 | 43.1% |
| 2009 Q2 | 21,687 | 8,885 | 3,059 | 2,806 | 6,937 | 41.0% |
| 2009 Q3 | 21,705 | 8,738 | 3,049 | 2,757 | 7,162 | 40.3% |
| International calls | | | | | | |
| 2007 | 5,891 | 1,832 | 363 | 1,738 | 1,958 | 31.1% |
| 2008 | 6,173 | 1,852 | 366 | 2,050 | 1,904 | 30.0% |
| 2008 Q3 | 1,521 | 455 | 87 | 537 | 443 | 29.9% |
| 2008 Q4 | 1,524 | 455 | 89 | 533 | 446 | 29.9% |
| 2009 Q1 | 1,565 | 452 | 86 | 554 | 474 | 28.9% |
| 2009 Q2 | 1,545 | 426 | 83 | 542 | 494 | 27.6% |
| 2009 Q3 | 1,547 | 407 | 84 | 529 | 527 | 26.3% |
| Calls to mobiles | | | | | | |
| 2007 | 14,364 | 7,192 | 1,589 | 1,214 | 4,369 | 50.1% |
| 2008 | 13,277 | 6,266 | 1,328 | 1,431 | 4,252 | 47.2% |
| 2008 Q3 | 3,300 | 1,543 | 323 | 377 | 1,056 | 46.8% |
| 2008 Q4 | 3,160 | 1,452 | 309 | 363 | 1,036 | 45.9% |
| 2009 Q1 | 3,149 | 1,397 | 296 | 365 | 1,092 | 44.4% |
| 2009 Q2 | 3,065 | 1,323 | 283 | 338 | 1,120 | 43.2% |
| 2009 Q3 | 3,082 | 1,297 | 279 | 318 | 1,188 | 42.1% |
| Other calls¹ | | | | | | |
| 2007 | 44,927 | 27,061 | 6,483 | 2,334 | 9,049 | 60.2% |
| 2008 | 32,697 | 17,689 | 3,846 | 2,711 | 8,451 | 54.1% |
| 2008 Q3 | 7,997 | 4,184 | 992 | 736 | 2,086 | 52.3% |
| 2008 Q4 | 7,396 | 3,786 | 929 | 698 | 1,983 | 51.2% |
| 2009 Q1 | 7,283 | 3,655 | 889 | 694 | 2,045 | 50.2% |
| 2009 Q2 | 6,891 | 3,308 | 813 | 668 | 2,102 | 48.0% |
| 2009 Q3 | 6,893 | 3,242 | 826 | 658 | 2,168 | 47.0% |

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 & Calls¹ | | | | | |
| 2007 | 5,988 | 3,741 | 1,071 | 1,175 | 62.5% |
| 2008 | 5,972 | 3,527 | 1,055 | 1,389 | 59.1% |
| 2008 Q3 | 1,476 | 865 | 260 | 351 | 58.6% |
| 2008 Q4 | 1,491 | 869 | 260 | 361 | 58.3% |
| 2009 Q1 | 1,428 | 812 | 260 | 356 | 56.9% |
| 2009 Q2 | 1,491 | 863 | 258 | 370 | 57.9% |
| 2009 Q3 | 1,455 | 800 | 259 | 397 | 55.0% |
| Access | | | | | |
| 2007 | 2,954 | 1,951 | 540 | 463 | 66.0% |
| 2008 | 3,047 | 1,936 | 532 | 579 | 63.5% |
| 2008 Q3 | 761 | 480 | 132 | 148 | 63.1% |
| 2008 Q4 | 770 | 477 | 133 | 160 | 62.0% |
| 2009 Q1 | 737 | 454 | 135 | 148 | 61.7% |
| 2009 Q2 | 783 | 486 | 135 | 163 | 62.0% |
| 2009 Q3 | 752 | 441 | 134 | 177 | 58.7% |
| Calls¹ | | | | | |
| 2007 | 3,034 | 1,791 | 531 | 712 | 59.0% |
| 2008 | 2,925 | 1,592 | 523 | 810 | 54.4% |
| 2008 Q3 | 715 | 385 | 128 | 202 | 53.8% |
| 2008 Q4 | 720 | 392 | 127 | 201 | 54.4% |
| 2009 Q1 | 692 | 358 | 126 | 208 | 51.7% |
| 2009 Q2 | 707 | 377 | 123 | 207 | 53.3% |
| 2009 Q3 | 703 | 359 | 125 | 220 | 51.0% |

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 | 23,570 | 16,047 | 4,114 | 3,408 | 68.1% |
| 2008 | 23,525 | 14,954 | 4,170 | 4,402 | 63.6% |
| 2008 Q3 | 23,521 | 15,287 | 4,154 | 4,080 | 65.0% |
| 2008 Q4 | 23,525 | 14,954 | 4,170 | 4,402 | 63.6% |
| 2009 Q1 | 23,459 | 14,513 | 4,177 | 4,769 | 61.9% |
| 2009 Q2 | 23,388 | 14,087 | 4,169 | 5,132 | 60.2% |
| 2009 Q3 | 23,359 | 13,694 | 4,182 | 5,483 | 58.6% |

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

| | All Operators | BT¹ | Virgin Media | Other | BT share¹ |
|---------|----------------------|-----------------------|---------------------|--------------|-----------------------------|
| 2007 | 110,866 | 60,669 | 19,870 | 30,327 | 54.7% |
| 2008 | 99,480 | 49,180 | 16,717 | 33,583 | 49.4% |
| 2008 Q3 | 24,118 | 11,783 | 4,044 | 8,291 | 48.9% |
| 2008 Q4 | 24,099 | 11,601 | 4,109 | 8,389 | 48.1% |
| 2009 Q1 | 24,285 | 11,354 | 4,031 | 8,900 | 46.8% |
| 2009 Q2 | 23,147 | 10,179 | 3,664 | 9,304 | 44.0% |
| 2009 Q3 | 23,284 | 9,963 | 3,642 | 9,679 | 42.8% |

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 | 863 | 517 | 154 | 192 | 59.9% |
| 2008 | 868 | 508 | 138 | 222 | 58.5% |
| 2008 Q3 | 215 | 125 | 34 | 56 | 58.2% |
| 2008 Q4 | 220 | 131 | 34 | 56 | 59.4% |
| 2009 Q1 | 221 | 126 | 36 | 59 | 57.0% |
| 2009 Q2 | 220 | 128 | 34 | 59 | 57.9% |
| 2009 Q3 | 223 | 124 | 36 | 62 | 55.6% |
| International calls | | | | | |
| 2007 | 308 | 165 | 39 | 103 | 53.7% |
| 2008 | 300 | 150 | 46 | 104 | 49.9% |
| 2008 Q3 | 74 | 37 | 11 | 26 | 49.8% |
| 2008 Q4 | 73 | 36 | 12 | 25 | 49.6% |
| 2009 Q1 | 71 | 34 | 11 | 26 | 47.4% |
| 2009 Q2 | 69 | 33 | 10 | 26 | 47.0% |
| 2009 Q3 | 70 | 31 | 11 | 28 | 44.9% |
| Calls to mobiles | | | | | |
| 2007 | 966 | 504 | 177 | 284 | 52.2% |
| 2008 | 943 | 448 | 180 | 314 | 47.5% |
| 2008 Q3 | 231 | 109 | 44 | 78 | 47.2% |
| 2008 Q4 | 227 | 107 | 42 | 78 | 47.2% |
| 2009 Q1 | 216 | 101 | 40 | 76 | 46.5% |
| 2009 Q2 | 217 | 101 | 40 | 75 | 46.7% |
| 2009 Q3 | 218 | 98 | 40 | 81 | 44.9% |
| Other calls¹ | | | | | |
| 2007 | 897 | 604 | 160 | 133 | 67.3% |
| 2008 | 814 | 486 | 158 | 170 | 59.7% |
| 2008 Q3 | 196 | 114 | 39 | 43 | 58.4% |
| 2008 Q4 | 199 | 117 | 40 | 42 | 58.9% |
| 2009 Q1 | 183 | 97 | 39 | 46 | 53.2% |
| 2009 Q2 | 201 | 116 | 39 | 47 | 57.6% |
| 2009 Q3 | 193 | 106 | 38 | 49 | 54.7% |

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 | 66,651 | 34,715 | 12,469 | 19,467 | 52.1% |
| 2008 | 65,747 | 31,450 | 12,037 | 22,260 | 47.8% |
| 2008 Q3 | 15,935 | 7,587 | 2,867 | 5,481 | 47.6% |
| 2008 Q4 | 16,402 | 7,744 | 2,995 | 5,663 | 47.2% |
| 2009 Q1 | 16,719 | 7,668 | 2,971 | 6,080 | 45.9% |
| 2009 Q2 | 15,849 | 6,816 | 2,678 | 6,355 | 43.0% |
| 2009 Q3 | 15,949 | 6,695 | 2,658 | 6,596 | 42.0% |
| International calls | | | | | |
| 2007 | 3,166 | 1,191 | 296 | 1,679 | 37.6% |
| 2008 | 3,790 | 1,243 | 307 | 2,240 | 32.8% |
| 2008 Q3 | 933 | 305 | 73 | 555 | 32.7% |
| 2008 Q4 | 964 | 314 | 75 | 575 | 32.6% |
| 2009 Q1 | 1,001 | 309 | 74 | 618 | 30.9% |
| 2009 Q2 | 1,021 | 291 | 71 | 659 | 28.5% |
| 2009 Q3 | 1,057 | 280 | 70 | 707 | 26.5% |
| Calls to mobiles | | | | | |
| 2007 | 7,536 | 4,182 | 1,200 | 2,154 | 55.5% |
| 2008 | 6,765 | 3,505 | 981 | 2,279 | 51.8% |
| 2008 Q3 | 1,662 | 858 | 236 | 568 | 51.6% |
| 2008 Q4 | 1,604 | 813 | 226 | 565 | 50.7% |
| 2009 Q1 | 1,551 | 760 | 210 | 581 | 49.0% |
| 2009 Q2 | 1,550 | 728 | 202 | 620 | 47.0% |
| 2009 Q3 | 1,568 | 704 | 195 | 669 | 44.9% |
| Other calls* | | | | | |
| 2007 | 33,513 | 20,581 | 5,905 | 7,027 | 61.4% |
| 2008 | 23,179 | 12,982 | 3,392 | 6,805 | 56.0% |
| 2008 Q3 | 5,589 | 3,033 | 868 | 1,688 | 54.3% |
| 2008 Q4 | 5,129 | 2,730 | 813 | 1,586 | 53.2% |
| 2009 Q1 | 5,014 | 2,617 | 776 | 1,621 | 52.2% |
| 2009 Q2 | 4,726 | 2,344 | 713 | 1,669 | 49.6% |
| 2009 Q3 | 4,711 | 2,284 | 719 | 1,708 | 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 11
Summary of business network access & call revenues by operator (£millions)

| | All Operators | BT | Virgin Media | Other | BT share |
|---------------------------------------|---------------|-------|--------------|-------|----------|
| Access & Calls¹ | | | | | |
| 2007 | 3,426 | 2,041 | 135 | 1,250 | 59.6% |
| 2008 | 3,187 | 1,835 | 120 | 1,232 | 57.6% |
| 2008 Q3 | 785 | 448 | 30 | 307 | 57.1% |
| 2008 Q4 | 761 | 428 | 28 | 304 | 56.3% |
| 2009 Q1 | 777 | 432 | 28 | 316 | 55.6% |
| 2009 Q2 | 759 | 411 | 27 | 320 | 54.2% |
| 2009 Q3 | 743 | 399 | 27 | 317 | 53.7% |
| Access | | | | | |
| 2007 | 1,664 | 1,193 | 39 | 432 | 71.7% |
| 2008 | 1,625 | 1,108 | 39 | 478 | 68.2% |
| 2008 Q3 | 405 | 275 | 10 | 119 | 68.1% |
| 2008 Q4 | 392 | 262 | 10 | 120 | 66.9% |
| 2009 Q1 | 393 | 263 | 10 | 121 | 66.8% |
| 2009 Q2 | 388 | 257 | 10 | 121 | 66.2% |
| 2009 Q3 | 380 | 248 | 10 | 123 | 65.2% |
| Calls¹ | | | | | |
| 2007 | 1,762 | 847 | 97 | 818 | 48.1% |
| 2008 | 1,562 | 727 | 81 | 754 | 46.5% |
| 2008 Q3 | 381 | 173 | 20 | 187 | 45.5% |
| 2008 Q4 | 369 | 166 | 19 | 184 | 45.0% |
| 2009 Q1 | 383 | 170 | 19 | 195 | 44.2% |
| 2009 Q2 | 371 | 155 | 18 | 199 | 41.7% |
| 2009 Q3 | 362 | 151 | 17 | 194 | 41.6% |

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 | 9,893 | 6,198 | 410 | 3,284 | 62.7% |
| 2008 | 9,710 | 5,613 | 435 | 3,662 | 57.8% |
| 2008 Q3 | 9,736 | 5,748 | 399 | 3,590 | 59.0% |
| 2008 Q4 | 9,710 | 5,613 | 435 | 3,662 | 57.8% |
| 2009 Q1 | 9,666 | 5,494 | 429 | 3,744 | 56.8% |
| 2009 Q2 | 9,399 | 5,193 | 428 | 3,777 | 55.3% |
| 2009 Q3 | 9,311 | 5,049 | 427 | 3,835 | 54.2% |

Table 13**Summary of business call volumes by operator (millions of minutes)¹**

| | All Operators | BT¹ | Virgin Media | Other Direct Access | Other Indirect Access | BT share¹ |
|---------|----------------------|-----------------------|---------------------|----------------------------|------------------------------|-----------------------------|
| 2007 | 50,071 | 21,211 | 2,999 | 10,495 | 15,366 | 42.4% |
| 2008 | 44,322 | 17,735 | 2,555 | 10,149 | 13,883 | 40.0% |
| 2008 Q3 | 11,059 | 4,348 | 646 | 2,582 | 3,483 | 39.3% |
| 2008 Q4 | 10,482 | 4,041 | 618 | 2,483 | 3,341 | 38.6% |
| 2009 Q1 | 10,622 | 4,005 | 630 | 2,362 | 3,624 | 37.7% |
| 2009 Q2 | 10,001 | 3,723 | 574 | 2,071 | 3,633 | 37.2% |
| 2009 Q3 | 9,896 | 3,674 | 596 | 1,845 | 3,781 | 37.1% |

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 | | | | | |
| 2007 | 581 | 292 | 30 | 259 | 50.2% |
| 2008 | 498 | 245 | 23 | 230 | 49.1% |
| 2008 Q3 | 122 | 61 | 6 | 56 | 49.7% |
| 2008 Q4 | 115 | 55 | 5 | 55 | 47.4% |
| 2009 Q1 | 120 | 57 | 5 | 57 | 47.7% |
| 2009 Q2 | 115 | 52 | 5 | 58 | 45.3% |
| 2009 Q3 | 112 | 51 | 5 | 56 | 45.5% |
| International calls | | | | | |
| 2007 | 256 | 113 | 6 | 136 | 44.3% |
| 2008 | 254 | 102 | 6 | 146 | 40.1% |
| 2008 Q3 | 60 | 22 | 1 | 36 | 37.1% |
| 2008 Q4 | 61 | 23 | 1 | 36 | 38.3% |
| 2009 Q1 | 62 | 23 | 1 | 38 | 37.6% |
| 2009 Q2 | 60 | 21 | 1 | 38 | 34.8% |
| 2009 Q3 | 58 | 20 | 1 | 37 | 33.7% |
| Calls to mobiles | | | | | |
| 2007 | 670 | 299 | 45 | 326 | 44.6% |
| 2008 | 591 | 270 | 39 | 282 | 45.6% |
| 2008 Q3 | 148 | 66 | 10 | 72 | 44.6% |
| 2008 Q4 | 140 | 64 | 9 | 67 | 46.0% |
| 2009 Q1 | 149 | 67 | 9 | 73 | 44.9% |
| 2009 Q2 | 142 | 61 | 9 | 72 | 43.1% |
| 2009 Q3 | 141 | 62 | 9 | 70 | 43.8% |
| Other calls¹ | | | | | |
| 2007 | 256 | 143 | 15 | 97 | 56.1% |
| 2008 | 219 | 110 | 13 | 96 | 50.3% |
| 2008 Q3 | 52 | 25 | 3 | 24 | 47.7% |
| 2008 Q4 | 52 | 23 | 3 | 26 | 44.6% |
| 2009 Q1 | 53 | 22 | 3 | 28 | 42.1% |
| 2009 Q2 | 54 | 20 | 3 | 31 | 37.9% |
| 2009 Q3 | 52 | 19 | 3 | 31 | 36.0% |

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 | | | | | | |
| 2007 | 29,442 | 11,418 | 1,965 | 6,373 | 9,686 | 38.8% |
| 2008 | 26,145 | 9,895 | 1,695 | 6,120 | 8,435 | 37.8% |
| 2008 Q3 | 6,489 | 2,427 | 421 | 1,553 | 2,088 | 37.4% |
| 2008 Q4 | 6,148 | 2,254 | 405 | 1,482 | 2,008 | 36.7% |
| 2009 Q1 | 6,239 | 2,235 | 419 | 1,400 | 2,184 | 35.8% |
| 2009 Q2 | 5,839 | 2,070 | 381 | 1,218 | 2,170 | 35.5% |
| 2009 Q3 | 5,755 | 2,042 | 391 | 1,082 | 2,240 | 35.5% |
| International calls | | | | | | |
| 2007 | 2,724 | 640 | 67 | 1,405 | 612 | 23.5% |
| 2008 | 2,382 | 608 | 59 | 1,231 | 485 | 25.5% |
| 2008 Q3 | 589 | 150 | 14 | 307 | 118 | 25.5% |
| 2008 Q4 | 560 | 141 | 14 | 293 | 111 | 25.2% |
| 2009 Q1 | 564 | 143 | 12 | 276 | 133 | 25.3% |
| 2009 Q2 | 524 | 135 | 12 | 249 | 128 | 25.8% |
| 2009 Q3 | 490 | 127 | 14 | 217 | 131 | 25.9% |
| Calls to mobiles | | | | | | |
| 2007 | 6,829 | 3,011 | 389 | 1,035 | 2,394 | 44.1% |
| 2008 | 6,512 | 2,760 | 347 | 1,103 | 2,302 | 42.4% |
| 2008 Q3 | 1,638 | 685 | 87 | 284 | 582 | 41.8% |
| 2008 Q4 | 1,555 | 638 | 83 | 275 | 559 | 41.0% |
| 2009 Q1 | 1,599 | 637 | 86 | 271 | 605 | 39.8% |
| 2009 Q2 | 1,516 | 596 | 81 | 234 | 605 | 39.3% |
| 2009 Q3 | 1,514 | 593 | 84 | 203 | 634 | 39.2% |
| Other calls* | | | | | | |
| 2007 | 11,076 | 6,142 | 578 | 1,682 | 2,674 | 55.5% |
| 2008 | 9,283 | 4,472 | 454 | 1,696 | 2,661 | 48.2% |
| 2008 Q3 | 2,344 | 1,086 | 124 | 438 | 695 | 46.3% |
| 2008 Q4 | 2,219 | 1,008 | 116 | 432 | 663 | 45.4% |
| 2009 Q1 | 2,220 | 990 | 113 | 416 | 702 | 44.6% |
| 2009 Q2 | 2,122 | 922 | 100 | 371 | 730 | 43.4% |
| 2009 Q3 | 2,137 | 912 | 107 | 342 | 776 | 42.7% |

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 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 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% |
| 2009 Q2 | 17,739 | 4,717 | 3,286 | 3,742 | 5,993 | 26.6% |
| 2009 Q3 | 17,934 | 4,783 | 3,220 | 3,774 | 6,157 | 26.7% |

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 Q3 (July to September 2009)

Table

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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 | Orange ⁴ |
|--------------------------------|-----------------------|--------------------|----------|---------------------|
| Calls and other charges | | | | |
| 2008 Q3 | 782 | 777 | 571 | 711 |
| 2008 Q4 | 766 | 744 | 577 | 685 |
| 2008 Q1 | 729 | 735 | 541 | 663 |
| 2009 Q2 | 717 | 769 ⁵ | 544 | 619 |
| 2009 Q3 | 715 | 814 | 559 | 621 |
| SMS and MMS | | | | |
| 2008 Q3 | 188 | 279 | 114 | 105 |
| 2008 Q4 | 187 | 278 | 103 | 107 |
| 2009 Q1 | 175 | 271 | 105 | 100 |
| 2009 Q2 | 184 | 269 | 102 | 82 |
| 2009 Q3 | 189 | 275 | 105 | 69 |
| Total | | | | |
| 2008 Q3 | 970 | 1,056 | 685 | 816 |
| 2008 Q4 | 954 | 1,022 | 680 | 792 |
| 2009 Q1 | 904 | 1,006 | 645 | 763 |
| 2009 Q2 | 901 | 1,038 ⁵ | 646 | 701 |
| 2009 Q3 | 904 | 1,090 | 664 | 690 |

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 Figure revised from December 2009 publication of Q2 2009 tables.

Table 2**Call volumes by call type and operator (millions of minutes)**

| | Vodafone ¹ | O2 ² | T-Mobile ³ | Orange ⁴ |
|-------------------------------|-----------------------|-----------------|-----------------------|---------------------|
| UK calls | | | | |
| 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 |
| 2009 Q2 | 6,099 | 8,995 | 4,518 | 5,690 |
| 2009 Q3 | 6,079 | 9,139 | 4,410 | 5,789 |
| Outgoing international | | | | |
| 2008 Q3 | 129 | 187 | 49 | 81 |
| 2008 Q4 | 127 | 191 | 48 | 81 |
| 2009 Q1 | 148 | 187 | 44 | 80 |
| 2009 Q2 | 147 | 210 | 44 | 83 |
| 2009 Q3 | 144 | 210 | 46 | 84 |
| While roaming abroad | | | | |
| 2008 Q3 | 202 | 213 | 56 | 125 |
| 2008 Q4 | 147 | 143 | 32 | 72 |
| 2009 Q1 | 140 | 134 | 29 | 64 |
| 2009 Q2 | 169 | 166 | 36 | 75 |
| 2009 Q3 | 228 | 219 | 46 | 94 |
| All calls | | | | |
| 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 |
| 2009 Q2 | 6,415 | 9,371 | 4,598 | 5,848 |
| 2009 Q3 | 6,451 | 9,568 | 4,502 | 5,967 |

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 3**Volume of SMS and MMS (millions)**

| | Vodafone ¹ | O2 ² | T-Mobile ³ | Orange ⁴ |
|---------|-----------------------|-----------------|-----------------------|---------------------|
| 2008 Q3 | 3,632 | 7,836 | 2,208 | 4,811 |
| 2008 Q4 | 4,003 | 8,565 | 2,484 | 5,418 |
| 2009 Q1 | 4,170 | 8,950 | 2,558 | 5,679 |
| 2009 Q2 | 4,278 | 9,518 | 2,649 | 5,731 |
| 2009 Q3 | 4,530 | 9,820 | 2,725 | 5,788 |

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 ⁴ |
|-------------------------------------|-----------------------|-----------------|-----------------------|---------------------|
| Connections during period | | | | |
| 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 |
| 2009 Q2 | 1,771 | 1,806 | 1,435 | 1,319 |
| 2009 Q3 | 2,140 | 1,857 | 1,036 | 1,762 |
| Subscribers at end of period | | | | |
| Post-pay | | | | |
| 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 |
| 2009 Q2 | 7,909 | 8,155 | 4,109 | 6,443 |
| 2009 Q3 | 8,166 | 8,446 | 4,070 | 6,637 |
| Pre-pay | | | | |
| 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 |
| 2009 Q2 | 8,098 | 11,658 | 12,479 | 9,410 |
| 2009 Q3 | 8,221 | 11,637 | 12,538 | 9,473 |
| Total | | | | |
| 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 |
| 2009 Q2 | 16,007 | 19,813 | 16,588 | 15,853 |
| 2009 Q3 | 16,388 | 20,083 | 16,608 | 16,110 |
| Net change during period | | | | |
| 2008 Q3 | 345 | 402 | 8 | 57 |
| 2008 Q4 | 44 | 390 | -16 | 180 |
| 2009 Q1 | -547 | 110 | -101 | -145 |
| 2009 Q2 | -12 | 233 | -96 | 3 |
| 2009 Q3 | 381 | 270 | 20 | 257 |

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 | Orange ⁴ |
|---------|-----------------------|-----------------|----------|---------------------|
| 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 |
| 2009 Q2 | 56.3 | 52.7 | 38.8 | 44.2 |
| 2009 Q3 | 55.8 | 54.6 | 40.0 | 43.2 |

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.

Table 6**Interconnection call volumes (millions of minutes)**

| | Vodafone ¹ | O2 ² | T-Mobile ³ | Orange ⁴ |
|---------------------|-----------------------|-----------------|-----------------------|---------------------|
| Call volumes | | | | |
| 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 |
| 2009 Q2 | 2,708 | 4,629 | 2,110 | 3,343 |
| 2009 Q3 | 2,801 | 4,699 | 2,128 | 3,105 |

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.