Telecommunications market data tables Q1 2013

1 – Market monitor

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1. Market monitor

We have made restatements to the data in the mobile telecoms tables in this report. These are as a result of revisions to our estimates for those MVNOs and service providers that do not provide regular quarterly data to Ofcom. We have revised these estimates because additional wholesale data has been made available to us and because a number of mobile providers have submitted data to Ofcom for the first time.

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

- UK fixed telephony services generated £2.1bn in retail revenues in Q1 2013, £61m (2.8%) less than in Q1 2012. BT's market share of these revenues was 46.0%, 1.7 percentage points less than it had been a year previously.

- There were 33.1 million fixed lines at the end of Q1 2013, 177,000 (0.5%) less than a year previously and 82,000 (0.2%) down on the previous quarter.

- UK fixed lines generated 24.8 billion minutes of calls in Q1 2013, 2.2 billion minutes (8.3%) less than there had been in Q1 2012. Over the same period, BT's share of fixed-originated call volumes increased by 0.5 percentage points to 39.3%.

Fixed broadband

- There were 21.9 million UK residential and SME fixed broadband connections at the end of Q1 2013, 967,000 (4.6%) more than there had been a year previously.

- ‘Other’ (including FTTx) connections (predominantly fibre connections) were the main driver of broadband connection growth in the year to Q1 2013, increasing by 792,000 over the period. Cable connections increased by 163,000 during the year, while the number of ADSL increased by 13,000 connections (0.1%).

- BT's retail share of these connections was 29.8% in Q1 2013, 0.6 percentage points higher than it was in Q1 2012.

Mobile

- Estimated retail mobile revenues increased by £91m (2.3%) to £4.0bn in the year to Q1 2013, however, this was a £31m (0.8%) decrease compared to the previous quarter.

- Mobile call volumes increased by 1.1% to 32.5 billion minutes in Q1 2013, but decreased by 0.8% year-on-year. In total, 36.3 billion SMS and MMS messages were sent in Q1 2013, 2.8 billion (7.2%) less than in Q1 2012.

- The number of active mobile subscribers fell by 0.8% (702,000) to 84.2 million in Q1 2013, however, this was 1.7% (1.4 million) higher than a year previously. The number of mobile broadband subscribers continued to fall in Q1 2013, down 9,000 (1.8%) compared to Q1 2012.

2. Fixed telecoms market data tables

Q1 2013 (January to March 2013)

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%
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%
2013 Q1	2,109	970	263	877	46.0%
Access					
2011	5,143	2,724	617	1,802	53.0%
2012	5,283	2,580	677	2,026	48.8%
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%
2013 Q1	1,357	633	177	547	46.6%
Calls[1]					
2011	3,675	1,589	456	1,629	43.2%
2012	3,233	1,402	389	1,442	43.4%
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%
2013 Q1	752	336	85	330	44.7%

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
2011	33,252	15,750	4,893	12,610	47.4%
2012	33,197	14,503	4,838	13,855	43.7%
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	33,031	14,728	4,824	13,479	44.6%
2012 Q4	33,197	14,503	4,838	13,855	43.7%
2013 Q1	33,115	14,185	4,828	14,103	42.8%

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%
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%
2013 Q1	24,817	9,753	3,059	6,594	5,410	39.3%

[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
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	216
2013 Q1	752	245	70	230	207

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	68,948	27,162	9,387	17,239	15,161	39.4%
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	16,780	6,607	2,293	4,362	3,518	39.4%
2013 Q1	16,530	6,519	2,289	4,355	3,367	39.4%
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%
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%
2013 Q1	1,282	260	67	647	308	20.3%
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%
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%
2013 Q1	2,173	838	196	467	672	38.6%
Other calls[1]						
2011	20,591	8,754	2,509	3,853	5,475	42.5%
2012	18,877	7,768	2,249	4,113	4,747	41.2%
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	4,621	1,871	524	1,094	1,132	40.5%
2013 Q1	4,831	2,136	507	1,126	1,062	44.2%

[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 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%
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%
2013 Q1	1,460	623	241	596	42.7%
Access					
2011	3,375	1,594	576	1,204	47.2%
2012	3,645	1,533	639	1,473	42.0%
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%
2013 Q1	954	378	168	407	39.6%
Calls[1]					
2011	2,441	1,147	400	895	47.0%
2012	2,142	1,012	337	794	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%
2013 Q1	506	245	73	189	48.3%

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

Table 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	24,444	10,341	4,322	9,781	42.3%
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	24,189	10,414	4,305	9,471	43.1%
2012 Q4	24,444	10,341	4,322	9,781	42.3%
2013 Q1	24,593	10,183	4,316	10,094	41.4%

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%
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%
2013 Q1	17,303	6,934	2,547	7,822	40.1%

[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
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
2013 Q1	506	184	41	126	155

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	51,955	21,051	8,062	22,842	40.5%
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	12,736	5,163	1,965	5,608	40.5%
2013 Q1	12,598	5,084	1,963	5,551	40.4%
International calls					
2011	4,570	890	261	3,419	19.5%
2012	4,107	743	239	3,125	18.1%
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%
2013 Q1	920	166	58	696	18.0%
Calls to mobiles					
2011	4,471	1,852	528	2,091	41.4%
2012	3,899	1,598	453	1,848	41.0%
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%
2013 Q1	877	351	108	418	40.0%
Other calls*					
2011	13,066	5,794	2,135	5,137	44.3%
2012	11,495	4,918	1,860	4,717	42.8%
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	2,702	1,173	431	1,098	43.4%
2013 Q1	2,907	1,333	418	1,156	45.9%

[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 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%
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%
2013 Q1	641	339	21	281	52.8%
Access					
2011	1,768	1,130	41	598	63.9%
2012	1,639	1,048	38	553	64.0%
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%
2013 Q1	403	255	9	139	63.2%
Calls[1]					
2011	1,193	402	57	735	33.7%
2012	1,055	354	52	648	33.6%
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%
2013 Q1	238	84	13	142	35.3%

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

Table 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	8,754	4,162	517	4,074	47.6%
2012 Q1	9,246	4,547	524	4,175	49.2%
2012 Q2	9,009	4,425	520	4,065	49.1%
2012 Q3	8,841	4,314	519	4,008	48.8%
2012 Q4	8,754	4,162	517	4,074	47.6%
2013 Q1	8,522	4,001	512	4,009	47.0%

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%
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%
2013 Q1	7,498	2,804	512	2,086	2,096	37.4%

[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
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
2013 Q1	238	62	29	103	44

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%
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%
2013 Q1	3,932	1,435	326	1,165	1,006	36.5%
International calls						
2011	1,899	496	41	845	517	26.1%
2012	1,742	433	36	878	394	24.9%
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%
2013 Q1	362	94	9	203	56	26.0%
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%
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%
2013 Q1	1,296	487	88	265	456	37.6%
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%
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%
2013 Q1	1,908	788	89	454	577	41.3%

[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 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%
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%
2013 Q1	21,890	7,371	8,850	4,328	1,342	29.8%

[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 2013 (January to March 2013)

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 svcs	UK fixed calls	On-net mobile calls	Off-net mobile calls	Int'l calls	Other calls	SMS and MMS	Data services
2011	15,609	5,926	650	542	1,093	486	2,092	2,573	2,247
2012	15,853	6,379	632	449	943	508	2,026	2,449	2,466
2012 Q1	3,876	1,543	154	118	256	118	487	621	577
2012 Q2	3,962	1,575	165	117	244	123	514	611	612
2012 Q3	4,017	1,613	159	112	232	130	529	606	635
2012 Q4	3,997	1,648	154	102	211	136	496	610	641
2013 Q1	3,967	1,652	147	86	186	140	462	630	664

Note: Includes estimates where Ofcom does not receive data from providers; excludes revenues from interconnection.

Table 2
Call and message volumes by call type (billions 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 & MMS messages
2011	129.64	31.71	43.45	41.57	5.50	1.83	5.58	151.00
2012	129.78	31.23	41.27	43.49	6.06	1.69	6.04	152.49
2012 Q1	32.76	7.94	10.78	10.82	1.47	0.37	1.39	39.13
2012 Q2	32.50	7.77	10.38	10.89	1.54	0.43	1.49	38.65
2012 Q3	32.36	7.87	10.17	10.79	1.52	0.52	1.50	37.11
2012 Q4	32.15	7.64	9.95	11.00	1.53	0.37	1.66	37.60
2013 Q1	32.50	8.08	9.73	11.18	1.60	0.39	1.53	36.30

Note: Includes estimates where Ofcom does not receive data from providers.

Table 3
Subscriber numbers by type (millions)

	Conns during period	Total subs at end of period	Post-pay subs at end of period	Pre-pay subs at end of period	Net change during period	Proportion post-pay	Mobile b'band subs at end of period
2011	33.03	83.70	39.84	43.86	1.02	47.6%	5.16
2012	32.68	84.94	43.54	41.40	1.24	51.3%	4.99
2012 Q1	7.96	82.79	40.65	42.14	-0.91	49.1%	5.12
2012 Q2	7.80	83.31	41.50	41.81	0.52	49.8%	5.10
2012 Q3	8.29	83.99	42.53	41.46	0.68	50.6%	5.07
2012 Q4	8.63	84.94	43.54	41.40	0.95	51.3%	4.99
2013 Q1	7.56	84.24	43.96	40.28	-0.70	52.2%	4.90

Note: Includes estimates where Ofcom does not receive data from providers.

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

	All subscribers	Post-pay contract	Pre-pay
2011	15.67	25.65	6.26
2012	15.80	24.43	6.13
2012 Q1	15.52	24.46	6.11
2012 Q2	15.90	24.66	6.22
2012 Q3	16.01	24.60	6.17
2012 Q4	15.78	24.03	6.01
2013 Q1	15.63	23.56	5.92

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 (billions of minutes)

	All operators
2011	59.01
2012	59.15
2012 Q1	14.59
2012 Q2	14.76
2012 Q3	14.71
2012 Q4	15.09
2013 Q1	14.67

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