Telecommunications market data tables Q1 2011

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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. In this issue we have made a number of changes to the format of the published tables:

1. In the fixed tables we no longer publish call revenue by call type data by operator.

2. In the mobile tables we no longer include network-specific data and instead include total market figures (which include data for the four MNOs and those MVNOs that submit data, along with Ofcom estimates for MVNOs and resellers that do not)..

Fixed voice

- Total retail fixed-line voice revenues were £2.3bn in Q1 2011, a 4.6% fall since Q1 2010. BT had a 49.2% share of these revenues, 2.3 percentage points lower than in Q1 2010.

- In the year to Q1 2011 total fixed originating call volumes fell by 10.1% to 30.9 billion minutes, while BT's share of fixed call volumes fell by 1.9 percentage points over the same period.

- At the end of Q1 2011 there were 33.3 million UK fixed lines, 568,000 less than a year previously.

Fixed broadband

- At the end of Q1 2011 there were 19.9 million UK fixed broadband connections, 1.3 million more than a year previously.

- BT remained the largest retail broadband provider in Q1 2011 with a market share of 27.8%, 1.0 percentage points higher than at the end of Q1 2010.

Mobile

- Mobile voice and data services generated an estimated £3.5bn in revenues in Q1 2011, £15m (0.4%) less than in 2010 Q1.

- For the second successive quarter mobile-originated call volumes (31.0 billion minutes) were higher than fixed-originated call volumes, with mobile accounting for 50.1% of outgoing call volumes.

- The total number of SMS and MMS messages sent in Q1 2011 was 36.9 billion, 22.7% higher than in Q1 2010.

- The total number of UK mobile connections fell by 39,000 to 81.1 million in Q1 2011. Pre-pay connections fell by 486,000 as consumers continue to migrate to pay-monthly contracts (up by 447,000). Of the 81.1 million total connections, 5.0 million (6.1%) were mobile broadband datacards or dongles.

2. Fixed telecoms market data tables

Q1 2011 (January to March 2011)

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]					
2009	9,675	5,308	1,152	3,215	54.9%
2010	9,337	4,714	1,164	3,459	50.5%
2010 Q1	2,381	1,225	287	869	51.5%
2010 Q2	2,355	1,195	291	868	50.8%
2010 Q3	2,295	1,135	293	867	49.5%
2010 Q4	2,306	1,158	293	855	50.2%
2011 Q1	2,271	1,117	274	880	49.2%
Access					
2009	4,955	3,166	576	1,214	63.9%
2010	4,830	2,837	602	1,391	58.7%
2010 Q1	1,219	737	145	337	60.5%
2010 Q2	1,224	726	153	344	59.4%
2010 Q3	1,186	683	152	351	57.5%
2010 Q4	1,202	691	153	359	57.5%
2011 Q1	1,229	693	151	385	56.4%
Calls[1]					
2009	4,720	2,142	576	2,001	45.4%
2010	4,507	1,877	562	2,068	41.7%
2010 Q1	1,162	488	142	532	42.0%
2010 Q2	1,131	469	138	524	41.5%
2010 Q3	1,109	453	141	515	40.8%
2010 Q4	1,104	468	140	496	42.4%
2011 Q1	1,042	424	123	495	40.7%

[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
2009	34,174	18,843	4,920	10,410	55.1%
2010	33,393	17,023	4,940	11,430	51.0%
2010 Q1	33,855	18,414	4,942	10,498	54.4%
2010 Q2	33,703	17,953	4,944	10,806	53.3%
2010 Q3	33,572	17,456	4,925	11,192	52.0%
2010 Q4	33,393	17,023	4,940	11,430	51.0%
2011 Q1	33,287	16,683	4,955	11,649	50.1%

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]
2009	134,277	56,640	17,408	18,393	41,836	42.2%
2010	130,250	49,834	15,833	22,892	41,692	38.3%
2010 Q1	34,399	13,566	4,286	5,494	11,053	39.4%
2010 Q2	32,085	12,102	3,851	5,652	10,480	37.7%
2010 Q3	31,888	11,983	3,792	5,890	10,223	37.6%
2010 Q4	31,878	12,183	3,904	5,855	9,936	38.2%
2011 Q1	30,924	11,619	3,711	6,361	9,233	37.6%

[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]
2009	4,720	1,373	514	1,641	1,192
2010	4,507	1,367	486	1,529	1,125
2010 Q1	1,162	354	126	398	284
2010 Q2	1,131	334	122	384	290
2010 Q3	1,109	330	120	377	283
2010 Q4	1,104	349	118	370	267
2011 Q1	1,042	320	115	348	259

[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						
2009	89,127	36,503	12,646	11,994	27,984	41.0%
2010	88,363	33,102	11,648	15,297	28,316	37.5%
2010 Q1	23,518	9,018	3,183	3,720	7,597	38.3%
2010 Q2	21,435	7,925	2,808	3,559	7,143	37.0%
2010 Q3	21,512	7,828	2,747	3,981	6,956	36.4%
2010 Q4	21,898	8,331	2,910	4,038	6,619	38.0%
2011 Q1	21,009	7,864	2,748	4,272	6,126	37.4%
International calls						
2009	6,990	1,709	338	2,189	2,754	24.5%
2010	7,195	1,605	328	2,474	2,787	22.3%
2010 Q1	1,810	421	85	582	722	23.3%
2010 Q2	1,818	405	82	627	703	22.3%
2010 Q3	1,786	386	80	641	679	21.6%
2010 Q4	1,781	393	81	623	684	22.1%
2011 Q1	1,885	382	79	746	678	20.3%
Calls to mobiles						
2009	12,375	5,254	1,124	1,420	4,577	42.5%
2010	11,852	4,538	975	1,650	4,690	38.3%
2010 Q1	3,095	1,206	258	402	1,229	39.0%
2010 Q2	2,957	1,131	244	395	1,186	38.3%
2010 Q3	2,934	1,111	238	425	1,161	37.9%
2010 Q4	2,867	1,090	235	428	1,114	38.0%
2011 Q1	2,727	1,025	219	459	1,024	37.6%
Other calls[1]						
2009	25,786	13,174	3,300	2,791	6,521	51.1%
2010	22,840	10,589	2,882	3,470	5,899	46.4%
2010 Q1	5,976	2,921	760	791	1,504	48.9%
2010 Q2	5,876	2,641	717	1,070	1,448	44.9%
2010 Q3	5,655	2,658	727	843	1,427	47.0%
2010 Q4	5,333	2,369	678	766	1,519	44.4%
2011 Q1	5,302	2,348	665	884	1,405	44.3%

[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 6
Summary of residential network access & call revenues by operator (£millions)

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2009	6,042	3,363	1,044	1,635	55.7%
2010	6,002	3,055	1,061	1,886	50.9%
2010 Q1	1,511	789	261	462	52.2%
2010 Q2	1,508	776	265	467	51.5%
2010 Q3	1,474	731	268	476	49.6%
2010 Q4	1,508	759	267	482	50.3%
2011 Q1	1,445	708	249	488	49.0%
Access					
2009	3,101	1,893	538	670	61.1%
2010	3,100	1,697	563	840	54.7%
2010 Q1	770	441	135	195	57.2%
2010 Q2	788	437	143	208	55.5%
2010 Q3	765	406	143	216	53.1%
2010 Q4	777	413	142	222	53.1%
2011 Q1	768	400	141	227	52.1%
Calls[1]					
2009	2,941	1,470	506	965	50.0%
2010	2,901	1,358	498	1,045	46.8%
2010 Q1	740	348	126	267	47.0%
2010 Q2	720	339	122	259	47.1%
2010 Q3	710	325	125	260	45.8%
2010 Q4	731	346	125	260	47.3%
2011 Q1	677	307	108	261	45.4%

[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
2009	23,998	13,330	4,249	6,419	55.5%
2010	23,746	12,043	4,313	7,390	50.7%
2010 Q1	23,805	13,047	4,292	6,467	54.8%
2010 Q2	23,715	12,703	4,304	6,708	53.6%
2010 Q3	23,688	12,331	4,292	7,065	52.1%
2010 Q4	23,746	12,043	4,313	7,390	50.7%
2011 Q1	23,660	11,825	4,336	7,499	50.0%

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

	All Operators	BT[1]	Virgin Media	Other	BT share[1]
2009	93,452	41,586	15,039	36,827	44.5%
2010	90,342	36,189	13,632	40,521	40.1%
2010 Q1	24,055	9,954	3,701	10,400	41.4%
2010 Q2	22,079	8,700	3,306	10,073	39.4%
2010 Q3	21,929	8,566	3,250	10,113	39.1%
2010 Q4	22,278	8,969	3,375	9,934	40.3%
2011 Q1	21,368	8,362	3,169	9,837	39.1%

[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]
2009	2,941	901	304	898	839
2010	2,901	936	293	849	824
2010 Q1	740	239	76	220	205
2010 Q2	720	226	73	214	208
2010 Q3	710	223	72	208	206
2010 Q4	731	247	73	207	204
2011 Q1	677	221	71	187	197

[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
2009	65,518	28,215	11,079	26,224	43.1%
2010	65,095	25,620	10,195	29,280	39.4%
2010 Q1	17,443	7,026	2,795	7,622	40.3%
2010 Q2	15,615	6,081	2,448	7,086	38.9%
2010 Q3	15,740	5,977	2,391	7,372	38.0%
2010 Q4	16,297	6,536	2,561	7,200	40.1%
2011 Q1	15,462	6,053	2,394	7,015	39.1%
International calls					
2009	4,684	1,171	289	3,224	25.0%
2010	4,846	1,053	284	3,509	21.7%
2010 Q1	1,218	280	73	865	23.0%
2010 Q2	1,217	265	71	881	21.8%
2010 Q3	1,197	250	69	878	20.9%
2010 Q4	1,214	258	71	885	21.3%
2011 Q1	1,322	245	68	1,009	18.5%
Calls to mobiles					
2009	6,217	2,869	792	2,556	46.1%
2010	5,636	2,324	648	2,664	41.2%
2010 Q1	1,478	629	171	678	42.5%
2010 Q2	1,409	583	163	663	41.4%
2010 Q3	1,393	559	158	676	40.1%
2010 Q4	1,356	553	156	647	40.8%
2011 Q1	1,234	485	137	612	39.3%
Other calls[1]					
2009	17,033	9,331	2,879	4,823	54.8%
2010	14,765	7,192	2,505	5,068	48.7%
2010 Q1	3,917	2,019	662	1,236	51.5%
2010 Q2	3,838	1,771	624	1,443	46.1%
2010 Q3	3,598	1,780	632	1,186	49.5%
2010 Q4	3,412	1,622	587	1,203	47.5%
2011 Q1	3,350	1,579	570	1,201	47.1%

[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]					
2009	3,573	1,885	108	1,580	52.8%
2010	3,286	1,609	103	1,573	49.0%
2010 Q1	858	424	26	407	49.5%
2010 Q2	833	406	26	402	48.7%
2010 Q3	808	391	25	391	48.4%
2010 Q4	786	388	26	373	49.3%
2011 Q1	817	399	26	391	48.9%
Access					
2009	1,855	1,272	38	544	68.6%
2010	1,730	1,140	39	551	65.9%
2010 Q1	448	297	10	142	66.2%
2010 Q2	436	289	10	137	66.4%
2010 Q3	421	276	9	136	65.6%
2010 Q4	425	278	10	136	65.4%
2011 Q1	461	292	10	158	63.4%
Calls[1]					
2009	1,718	612	70	1,036	35.6%
2010	1,555	469	64	1,022	30.2%
2010 Q1	410	128	16	266	31.1%
2010 Q2	398	117	16	265	29.3%
2010 Q3	387	115	16	255	29.7%
2010 Q4	361	110	15	236	30.4%
2011 Q1	356	107	15	233	30.2%

[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
2009	10,176	5,513	672	3,991	54.2%
2010	9,647	4,980	627	4,041	51.6%
2010 Q1	10,049	5,367	651	4,032	53.4%
2010 Q2	9,988	5,250	640	4,098	52.6%
2010 Q3	9,884	5,125	633	4,127	51.8%
2010 Q4	9,647	4,980	627	4,041	51.6%
2011 Q1	9,627	4,858	619	4,150	50.5%

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]
2009	40,655	14,883	2,369	8,605	14,798	36.6%
2010	39,796	13,531	2,201	8,381	15,683	34.0%
2010 Q1	10,312	3,580	585	2,081	4,066	34.7%
2010 Q2	9,975	3,371	545	2,108	3,951	33.8%
2010 Q3	9,930	3,388	542	2,119	3,882	34.1%
2010 Q4	9,579	3,192	529	2,073	3,785	33.3%
2011 Q1	9,537	3,238	542	2,076	3,681	34.0%

[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]
2009	1,718	472	210	743	293
2010	1,555	431	193	680	251
2010 Q1	410	115	51	178	66
2010 Q2	398	108	49	171	70
2010 Q3	387	106	48	168	64
2010 Q4	361	102	45	163	51
2011 Q1	356	99	44	160	52

[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						
2009	23,609	8,288	1,567	5,013	8,741	35.1%
2010	23,269	7,482	1,453	4,897	9,437	32.2%
2010 Q1	6,075	1,992	388	1,220	2,475	32.8%
2010 Q2	5,820	1,844	360	1,224	2,392	31.7%
2010 Q3	5,772	1,851	356	1,241	2,324	32.1%
2010 Q4	5,602	1,795	349	1,212	2,246	32.0%
2011 Q1	5,547	1,811	354	1,210	2,173	32.6%
International calls						
2009	2,305	538	49	1,014	704	23.3%
2010	2,348	551	44	923	831	23.5%
2010 Q1	591	140	12	229	210	23.7%
2010 Q2	600	140	11	241	208	23.3%
2010 Q3	589	136	11	234	208	23.1%
2010 Q4	567	135	10	217	205	23.8%
2011 Q1	563	137	11	210	205	24.3%
Calls to mobiles						
2009	6,159	2,386	332	966	2,475	38.7%
2010	6,216	2,214	327	957	2,719	35.6%
2010 Q1	1,617	577	87	240	713	35.7%
2010 Q2	1,547	548	81	233	685	35.4%
2010 Q3	1,541	552	80	241	668	35.8%
2010 Q4	1,511	537	79	243	652	35.5%
2011 Q1	1,493	540	82	242	629	36.2%
Other calls[1]						
2009	8,581	3,671	421	1,612	2,877	42.8%
2010	7,962	3,284	377	1,605	2,696	41.2%
2010 Q1	2,029	871	98	392	668	42.9%
2010 Q2	2,007	839	93	410	665	41.8%
2010 Q3	2,028	849	95	402	682	41.9%
2010 Q4	1,899	725	91	401	682	38.2%
2011 Q1	1,934	750	95	414	674	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 (000's)[1]

	Total	BT retail DSL	Other non-LLU DSL	Virgin Media Cable	Other (inc. LLU DSL)	BT retail share
2009	18,260	4,876	3,130	3,845	6,409	26.7%
2010	19,580	5,387	2,547	4,028	7,618	27.5%
2010 Q1	18,611	4,997	3,021	3,917	6,676	26.9%
2010 Q2	18,882	5,092	2,881	3,943	6,967	27.0%
2010 Q3	19,121	5,204	2,725	3,986	7,206	27.2%
2010 Q4	19,580	5,387	2,547	4,028	7,618	27.5%
2011 Q1	19,920	5,543	2,511	4,078	7,788	27.8%

[1] Figures exclude corporate broadband connections; BT retail connection numbers have been adjusted to exclude corporate broadband based on Ofcom estimates.

3. Mobile telecoms market data tables

Q1 2011 (January to March 2011)

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 svcs
2009	14,572	6,418	705	639	1,461	399	882	2,585	1,484
2010	14,506	6,418	638	608	1,230	354	944	2,584	1,731
2010 Q1	3,554	1,579	162	139	331	85	228	634	397
2010 Q2	3,624	1,618	155	152	308	86	247	631	427
2010 Q3	3,680	1,599	159	154	295	92	261	654	466
2010 Q4	3,648	1,622	163	163	296	91	208	664	441
2011 Q1	3,539	1,619	142	138	258	86	203	635	459

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

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 messages
2009	121,728	31,607	41,912	38,004	2,065	1,878	6,262	104,643
2010	127,312	32,014	44,545	38,092	2,053	1,878	8,731	128,757
2010 Q1	31,637	8,029	11,113	9,849	503	406	1,737	30,062
2010 Q2	31,742	7,811	11,187	9,371	515	504	2,354	31,041
2010 Q3	31,509	7,961	11,067	9,329	511	544	2,097	31,734
2010 Q4	32,424	8,213	11,178	9,542	523	424	2,543	35,921
2011 Q1	31,016	7,988	10,985	9,556	518	414	1,554	36,876

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

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
2009	33,522	80,279	33,212	47,067	41.4%	4,100
2010	33,472	81,165	37,126	44,039	45.7%	4,818
2010 Q1	7,829	81,675	34,653	47,022	42.4%	4,305
2010 Q2[1]	7,949	79,448	35,190	44,258	44.3%	4,232
2010 Q3	8,597	80,158	36,009	44,149	44.9%	4,371
2010 Q4	9,098	81,165	37,126	44,039	45.7%	4,818
2011 Q1	7,338	81,126	37,573	43,553	46.3%	4,979

[1] In 2010 Q2, T-Mobile and Orange aligned the period they used to define an active subscriber to 90 days. It was previously 180 days in the case of T-Mobile. This alignment caused a substantial change in the pre-pay subs figures.
Note: 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 contract	Pre-pay
2009	15.72	28.40	6.97
2010	15.02	25.81	6.62
2010 Q1	14.63	26.12	6.34
2010 Q2	14.99	26.08	6.51
2010 Q3	15.37	25.96	6.84
2010 Q4	15.07	25.08	6.77
2011 Q1	14.54	24.43	6.10

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
2009	57,084
2010	56,177
2010 Q1	14,617
2010 Q2	13,892
2010 Q3	13,724
2010 Q4	13,944
2011 Q1	14,500

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