Telecommunications market data tables Q2 2011

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Published: **17 November 2011**

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

- Total UK fixed line voice retail revenues were £2.2bn in Q2 2011, £168m (7.2%) lower than in Q2 2010. BT's share of these revenues was 49.8%, 0.6 percentage points higher than in the previous quarter.
- 29.1 billion minutes of fixed-originated calls were made during the quarter, 9.1% less than a year previously.
- There were 33.3million fixed lines at the end of June 2011, a 158,000 decrease compared to June 2010. BT's share of fixed lines fell to under 50% for the first time during the quarter, and was 49.3% at the end of the period.

Fixed broadband

- The total number of non-corporate fixed broadband connections passed 20 million for the first time during the quarter, and there were 20.3 million at the end of June 2011, 7.3% more than there had been a year previously.
- BT's share of fixed broadband connections was 28.0% at the end of June 2011, one percentage point higher than at the end of Q2 2010.

Mobile

- Mobile voice and data services generated an estimated £3.7bn in revenues in Q2 2011, £36m (1.0%) less than in 2010 Q2.
- For the second successive quarter mobile-originated call volumes (30.7 billion minutes) were higher than fixed-originated call volumes, with mobile now accounting for 51.3% of outgoing call volumes, though mobile call volumes still fell fell 1.6% compared to Q2 2010.
- Growth in the total number of SMS and MMS messages appears to have slowed, with the number sent in Q2 2011 0.2% higher than Q1 2011. This follows a rise of 2.5% in the previous quarter and a rise of 18.8% from Q2 2010 to Q2 2011.
- The total number of UK mobile connections fell by 316,000 to 80.8 million in Q2 2011. Pre-pay connections fell by 858,000 as consumers continue to migrate to pay-monthly contracts (up by 539,000). Of the 80.8 million total connections, 5.0 million (6.2%) were mobile broadband datacards or dongles.

2. Fixed telecoms market data tables

Q2 2011 (April to June 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	9,610	5,308	1,152	3,150	55.2%
2010	9,315	4,714	1,164	3,436	50.6%
2010 Q2	2,348	1,195	291	862	50.9%
2010 Q3	2,293	1,135	293	864	49.5%
2010 Q4	2,305	1,158	293	854	50.2%
2011 Q1	2,271	1,117	274	880	49.2%
2011 Q2	2,180	1,085	275	819	49.8%
Access					
2009	4,890	3,166	576	1,149	64.7%
2010	4,810	2,837	602	1,370	59.0%
2010 Q2	1,217	726	153	338	59.7%
2010 Q3	1,183	683	152	349	57.7%
2010 Q4	1,203	691	153	360	57.4%
2011 Q1	1,232	693	151	388	56.2%
2011 Q2	1,212	683	159	370	56.3%
Calls[1]					
2009	4,720	2,142	576	2,001	45.4%
2010	4,505	1,877	562	2,066	41.7%
2010 Q2	1,131	469	138	524	41.5%
2010 Q3	1,109	453	141	515	40.8%
2010 Q4	1,102	468	140	494	42.4%
2011 Q1	1,039	424	123	491	40.8%
2011 Q2	968	403	116	449	41.6%

[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
2009	33,550	18,843	4,920	9,786	56.2%
2010	33,404	17,023	4,940	11,441	51.0%
2010 Q2	33,454	17,953	4,944	10,556	53.7%
2010 Q3	33,453	17,456	4,925	11,072	52.2%
2010 Q4	33,404	17,023	4,940	11,441	51.0%
2011 Q1	33,307	16,683	4,955	11,669	50.1%
2011 Q2	33,296	16,403	4,921	11,971	49.3%

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	130,235	49,834	15,833	22,890	41,679	38.3%
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	31,863	12,183	3,904	5,853	9,923	38.2%
2011 Q1	30,975	11,619	3,711	6,360	9,285	37.5%
2011 Q2	29,177	10,693	3,407	6,310	8,767	36.6%

[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	4,505	1,366	486	1,528	1,125
2010 Q2	1,131	334	122	384	290
2010 Q3	1,109	330	120	377	283
2010 Q4	1,102	348	118	369	267
2011 Q1	1,039	319	111	349	259
2011 Q2	968	298	101	327	241

[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	88,385	33,102	11,648	15,297	28,338	37.5%
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	21,920	8,331	2,910	4,038	6,641	38.0%
2011 Q1	21,099	7,864	2,748	4,267	6,219	37.3%
2011 Q2	19,713	7,185	2,494	4,150	5,884	36.4%
International calls						
2009	6,990	1,709	338	2,189	2,754	24.5%
2010	7,198	1,605	328	2,474	2,790	22.3%
2010 Q2	1,818	405	82	627	703	22.3%
2010 Q3	1,786	386	80	641	679	21.6%
2010 Q4	1,784	393	81	623	687	22.0%
2011 Q1	1,861	382	79	746	654	20.5%
2011 Q2	1,794	359	78	737	619	20.0%
Calls to mobiles						
2009	12,375	5,254	1,124	1,420	4,577	42.5%
2010	11,852	4,538	975	1,650	4,689	38.3%
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	2,866	1,090	235	428	1,113	38.0%
2011 Q1	2,736	1,025	219	459	1,033	37.5%
2011 Q2	2,629	975	209	459	986	37.1%
Other calls[1]						
2009	25,786	13,174	3,300	2,791	6,521	51.1%
2010	22,800	10,589	2,882	3,468	5,861	46.4%
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	5,293	2,369	678	764	1,482	44.8%
2011 Q1	5,279	2,348	665	887	1,379	44.5%
2011 Q2	5,042	2,174	626	964	1,278	43.1%

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

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2009	5,965	3,363	1,044	1,558	56.4%
2010	5,967	3,055	1,061	1,851	51.2%
2010 Q2	1,498	776	265	457	51.8%
2010 Q3	1,468	731	268	470	49.8%
2010 Q4	1,506	759	267	480	50.4%
2011 Q1	1,441	708	249	485	49.1%
2011 Q2	1,388	685	251	452	49.3%
Access					
2009	3,024	1,893	538	593	62.6%
2010	3,066	1,697	563	806	55.3%
2010 Q2	778	437	143	198	56.2%
2010 Q3	759	406	143	209	53.6%
2010 Q4	775	413	142	220	53.3%
2011 Q1	768	400	141	227	52.1%
2011 Q2	763	396	149	218	51.8%
Calls[1]					
2009	2,941	1,470	506	965	50.0%
2010	2,901	1,358	498	1,045	46.8%
2010 Q2	720	339	122	259	47.1%
2010 Q3	710	325	125	260	45.8%
2010 Q4	731	346	125	259	47.4%
2011 Q1	673	307	108	258	45.6%
2011 Q2	625	289	102	233	46.3%

[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	23,371	13,330	4,249	5,792	57.0%
2010	23,746	12,043	4,313	7,390	50.7%
2010 Q2	23,464	12,703	4,304	6,457	54.1%
2010 Q3	23,563	12,331	4,292	6,939	52.3%
2010 Q4	23,746	12,043	4,313	7,390	50.7%
2011 Q1	23,660	11,825	4,336	7,499	50.0%
2011 Q2	23,729	11,576	4,323	7,830	48.8%

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	90,361	36,189	13,632	40,540	40.0%
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	22,298	8,969	3,375	9,954	40.2%
2011 Q1	21,408	8,362	3,169	9,877	39.1%
2011 Q2	20,125	7,668	2,909	9,548	38.1%

[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	935	293	849	824
2010 Q2	720	226	73	214	208
2010 Q3	710	223	72	208	206
2010 Q4	731	246	73	207	204
2011 Q1	673	220	66	189	198
2011 Q2	625	202	60	179	183

[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					
2009	65,518	28,215	11,079	26,224	43.1%
2010	65,134	25,620	10,195	29,319	39.3%
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	16,336	6,536	2,561	7,239	40.0%
2011 Q1	15,548	6,053	2,394	7,101	38.9%
2011 Q2	14,484	5,523	2,173	6,788	38.1%
International calls					
2009	4,684	1,171	289	3,224	25.0%
2010	4,850	1,053	284	3,513	21.7%
2010 Q2	1,217	265	71	881	21.8%
2010 Q3	1,197	250	69	878	20.9%
2010 Q4	1,218	258	71	889	21.2%
2011 Q1	1,291	245	68	978	19.0%
2011 Q2	1,244	232	66	946	18.6%
Calls to mobiles					
2009	6,217	2,869	792	2,556	46.1%
2010	5,642	2,324	648	2,670	41.2%
2010 Q2	1,409	583	163	663	41.4%
2010 Q3	1,393	559	158	676	40.1%
2010 Q4	1,361	553	156	652	40.6%
2011 Q1	1,244	485	137	622	39.0%
2011 Q2	1,210	467	133	610	38.6%
Other calls*					
2009	17,033	9,331	2,879	4,823	54.8%
2010	14,736	7,192	2,505	5,039	48.8%
2010 Q2	3,838	1,771	624	1,443	46.1%
2010 Q3	3,598	1,780	632	1,186	49.5%
2010 Q4	3,383	1,622	587	1,174	47.9%
2011 Q1	3,325	1,579	570	1,176	47.5%
2011 Q2	3,187	1,446	537	1,204	45.4%

[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	3,585	1,885	108	1,592	52.6%
2010	3,297	1,609	103	1,585	48.8%
2010 Q2	837	406	26	405	48.5%
2010 Q3	811	391	25	395	48.2%
2010 Q4	788	388	26	375	49.2%
2011 Q1	820	399	26	395	48.7%
2011 Q2	782	390	24	367	49.9%
Access					
2009	1,867	1,272	38	556	68.2%
2010	1,743	1,140	39	564	65.4%
2010 Q2	439	289	10	140	65.9%
2010 Q3	425	276	9	139	65.0%
2010 Q4	428	278	10	140	65.0%
2011 Q1	464	292	10	161	63.0%
2011 Q2	449	287	10	152	64.0%
Calls[1]					
2009	1,718	612	70	1,036	35.6%
2010	1,554	469	64	1,021	30.2%
2010 Q2	398	117	16	265	29.3%
2010 Q3	387	115	16	255	29.7%
2010 Q4	360	110	15	235	30.5%
2011 Q1	356	107	15	233	30.2%
2011 Q2	333	103	14	216	31.0%

[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	10,179	5,513	672	3,994	54.2%
2010	9,658	4,980	627	4,052	51.6%
2010 Q2	9,989	5,250	640	4,099	52.6%
2010 Q3	9,890	5,125	633	4,133	51.8%
2010 Q4	9,658	4,980	627	4,052	51.6%
2011 Q1	9,647	4,858	619	4,170	50.4%
2011 Q2	9,567	4,827	598	4,142	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	39,761	13,531	2,201	8,379	15,650	34.0%
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	9,544	3,192	529	2,071	3,752	33.4%
2011 Q1	9,548	3,238	542	2,076	3,692	33.9%
2011 Q2	9,033	3,005	498	2,036	3,494	33.3%

[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	1,554	431	193	679	251
2010 Q2	398	108	49	171	70
2010 Q3	387	106	48	168	64
2010 Q4	360	102	45	162	51
2011 Q1	356	99	45	160	52
2011 Q2	333	96	41	148	48

[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	23,252	7,482	1,453	4,897	9,420	32.2%
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	5,585	1,795	349	1,212	2,229	32.1%
2011 Q1	5,551	1,811	354	1,207	2,179	32.6%
2011 Q2	5,229	1,662	321	1,184	2,062	31.8%
International calls						
2009	2,305	538	49	1,014	704	23.3%
2010	2,347	551	44	923	830	23.5%
2010 Q2	600	140	11	241	208	23.3%
2010 Q3	589	136	11	234	208	23.1%
2010 Q4	566	135	10	217	204	23.8%
2011 Q1	570	137	11	210	212	24.0%
2011 Q2	550	127	12	208	202	23.1%
Calls to mobiles						
2009	6,159	2,386	332	966	2,475	38.7%
2010	6,210	2,214	327	957	2,713	35.7%
2010 Q2	1,547	548	81	233	685	35.4%
2010 Q3	1,541	552	80	241	668	35.8%
2010 Q4	1,505	537	79	243	646	35.7%
2011 Q1	1,492	540	82	242	628	36.2%
2011 Q2	1,419	508	76	237	598	35.8%
Other calls*						
2009	8,581	3,671	421	1,612	2,877	42.8%
2010	7,951	3,284	377	1,603	2,687	41.3%
2010 Q2	2,007	839	93	410	665	41.8%
2010 Q3	2,028	849	95	402	682	41.9%
2010 Q4	1,888	725	91	399	673	38.4%
2011 Q1	1,935	750	95	416	673	38.8%
2011 Q2	1,836	708	89	407	632	38.6%

[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 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%
2011 Q2	20,266	5,682	2,731	4,065	7,787	28.0%

[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

Q2 2011 (April to June 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 services	UK fixed calls	On-net mobile calls	Off-net mobile calls	Int'l calls	Other calls	Data services
2009	14,921	6,416	705	639	1,460	399	1,233	1,484
2010	14,913	6,415	638	607	1,228	353	1,355	1,731
2010 Q1	3,647	1,579	162	139	330	85	322	397
2010 Q2	3,723	1,618	155	152	308	86	346	427
2010 Q3	3,786	1,598	159	154	294	92	368	466
2010 Q4	3,757	1,621	163	163	296	91	319	441
2011 Q1	3,660	1,619	142	138	258	86	324	459
2011 Q2	3,686	1,617	140	131	268	89	367	456

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
2009	120,574	31,598	41,903	37,993	2,064	1,877	5,138	104,853
2010	124,947	31,999	44,528	38,074	2,051	1,877	6,419	129,012
2010 Q1	31,362	8,027	11,111	9,847	503	406	1,469	30,122
2010 Q2	31,216	7,808	11,184	9,367	515	504	1,839	31,104
2010 Q3	30,827	7,956	11,062	9,324	511	543	1,430	31,793
2010 Q4	31,542	8,207	11,172	9,536	522	424	1,681	35,994
2011 Q1	31,016	7,988	10,985	9,556	518	414	1,554	36,876
2011 Q2	30,727	7,811	10,214	10,340	522	477	1,363	36,945

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%	4,919[2]
2011 Q2	7,476	80,810	38,112	42,695	47.2%	4,971[2]

[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.
[2] Includes 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
2009	16.09	29.12	7.11
2010	15.44	26.57	6.77
2010 Q1	15.01	26.84	6.49
2010 Q2	15.40	26.83	6.66
2010 Q3	15.81	26.74	7.01
2010 Q4	15.53	25.88	6.94
2011 Q1	15.04	25.29	6.29
2011 Q2	15.18	25.14	6.43

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
2011 Q2	14,718

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