Telecommunications market data tables Q4 2009

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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

- At £2.24bn, total fixed voice revenues in Q4 2009 were 1% lower than in Q4 2008.
- This annual fall in revenues was mirrored by a fall in call volumes, which at 34.3 billion minutes were 1% lower in Q4 2009 than in Q4 2008.
- BT's retail share of analogue lines and ISDN channels was 56.7%at the end of 2009, 0.9 percentage points lower than in the previous quarter and 5.1 percentage points lower than at the end of 2008.

Fixed broadband

- At the end of 2009 there were an estimated 18.2 million UK residential and SME broadband connections, 317k more than at the end of the previous quarter and 957k more than there were at the end of 2008.
- BT continued to be the largest residential and SME broadband supplier during the quarter, with its market share unchanged at 26.7%.

Mobile[1]

- Total revenues fell by 2.1% across the UK's four largest mobile operators between Q4 2008 and Q4 2009, the slowest rate of annual decline during 2009. Revenue from calls and other charges and messaging services decreased by 2.1% and 2% respectively; compared to steeper declines of -3.9% and -7.1% in Q3 2009.
- Total call volumes across the four operators increased by 6.3% year-on-year to 27.4 billion in Q4 2009; the majority of this growth originated from calls to UK-based numbers (+6.4%). Roaming calls volumes were 1.5% lower than in Q4 2008 while calls to international destinations continued to increase (6.0%), albeit at a slower rate than previous quarters in 2009.
- Total messaging volumes reached nearly 26 billion in Q4 2009, equivalent to 367 messages per subscriber; this compares to nearly 20.5 billion or 299 messages per subscriber in Q4 2008
- The number of active mobile subscriptions grew by nearly 1.5 million in Q4 2009 to 70.65 million, the highest quarterly increase since Q4 2005. This growth was equally driven by increases in post-pay (+734k) and pre-pay subscribers (+729k).

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

2. Fixed telecoms market data tables

2009 Q4 (October to December 2009)

Table

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 & Calls[1]					
2008	9,201	5,436	1,175	2,589	59.1%
2009	8,894	4,957	1,152	2,785	55.7%
2008 Q4	2,260	1,314	289	657	58.2%
2009 Q1	2,209	1,259	289	662	57.0%
2009 Q2	2,251	1,290	285	676	57.3%
2009 Q3	2,195	1,214	286	695	55.3%
2009 Q4	2,239	1,194	293	752	53.3%
Access					
2008	4,672	3,044	571	1,057	65.2%
2009	4,563	2,815	576	1,172	61.7%
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	1,131	689	144	298	60.9%
2009 Q4	1,131	666	144	321	58.9%
Calls[1]					
2008	4,529	2,392	604	1,533	52.8%
2009	4,331	2,142	576	1,612	49.5%
2008 Q4	1,097	575	146	377	52.4%
2009 Q1	1,079	542	144	393	50.2%
2009 Q2	1,080	547	140	392	50.7%
2009 Q3	1,064	525	142	396	49.4%
2009 Q4	1,108	528	149	431	47.6%

[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
2008	33,235	20,567	4,605	8,064	61.9%
2009	32,117	18,222	4,638	9,258	56.7%
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	32,527	18,742	4,609	9,176	57.6%
2009 Q4	32,117	18,222	4,638	9,258	56.7%

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]
2008	144,039	67,152	19,272	16,984	40,631	46.6%
2009	135,266	56,640	17,408	18,164	43,054	41.9%
2008 Q4	34,631	15,691	4,727	4,397	9,815	45.3%
2009 Q1	34,946	15,407	4,661	4,512	10,366	44.1%
2009 Q2	33,037	13,942	4,238	4,355	10,502	42.2%
2009 Q3	33,004	13,684	4,238	4,297	10,785	41.5%
2009 Q4	34,278	13,607	4,271	4,999	11,400	39.7%

[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					
2008	1,368	753	161	454	55.0%
2009	1,373	725	167	481	52.8%
2008 Q4	336	185	39	112	55.2%
2009 Q1	342	183	41	118	53.6%
2009 Q2	335	180	39	116	53.7%
2009 Q3	333	174	41	117	52.4%
2009 Q4	363	187	46	130	51.5%
International calls					
2008	554	252	53	250	45.4%
2009	514	211	47	256	41.0%
2008 Q4	134	60	13	61	44.5%
2009 Q1	133	57	12	64	42.8%
2009 Q2	129	53	12	64	41.4%
2009 Q3	126	51	12	63	40.5%
2009 Q4	126	49	12	65	39.1%
Calls to mobiles					
2008	1,530	718	220	592	46.9%
2009	1,442	641	194	607	44.5%
2008 Q4	367	172	51	144	46.9%
2009 Q1	364	167	49	148	46.0%
2009 Q2	358	163	49	147	45.4%
2009 Q3	358	159	48	150	44.6%
2009 Q4	362	152	48	163	41.9%
Other calls[1]					
2008	1,076	669	170	236	62.2%
2009	1,001	565	168	268	56.5%
2008 Q4	260	157	43	60	60.5%
2009 Q1	240	134	42	63	55.9%
2009 Q2	258	152	41	65	58.8%
2009 Q3	247	141	41	66	56.8%
2009 Q4	256	139	44	73	54.4%

[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						
2008	91,892	41,345	13,732	10,792	26,023	45.0%
2009	88,992	36,503	12,646	11,863	27,980	41.0%
2008 Q4	22,551	9,998	3,400	2,803	6,349	44.3%
2009 Q1	22,953	9,903	3,390	2,901	6,759	43.1%
2009 Q2	21,554	8,885	3,059	2,806	6,804	41.2%
2009 Q3	21,533	8,738	3,049	2,784	6,962	40.6%
2009 Q4	22,952	8,977	3,148	3,372	7,455	39.1%
International calls						
2008	6,173	1,852	366	2,050	1,904	30.0%
2009	6,189	1,709	338	2,182	1,960	27.6%
2008 Q4	1,524	455	89	533	446	29.9%
2009 Q1	1,565	452	86	554	473	28.9%
2009 Q2	1,542	426	83	542	490	27.6%
2009 Q3	1,512	407	84	531	490	26.9%
2009 Q4	1,570	424	85	555	506	27.0%
Calls to mobiles						
2008	13,277	6,266	1,328	1,431	4,252	47.2%
2009	12,445	5,254	1,124	1,397	4,670	42.2%
2008 Q4	3,160	1,452	309	363	1,036	45.9%
2009 Q1	3,148	1,397	296	365	1,090	44.4%
2009 Q2	3,063	1,323	283	338	1,118	43.2%
2009 Q3	3,079	1,297	279	320	1,183	42.1%
2009 Q4	3,156	1,237	266	375	1,278	39.2%
Other calls[1]						
2008	32,697	17,689	3,846	2,711	8,451	54.1%
2009	27,640	13,174	3,300	2,722	8,443	47.7%
2008 Q4	7,396	3,786	929	698	1,983	51.2%
2009 Q1	7,281	3,655	889	694	2,043	50.2%
2009 Q2	6,879	3,308	813	668	2,090	48.1%
2009 Q3	6,880	3,242	826	663	2,150	47.1%
2009 Q4	6,600	2,969	772	698	2,161	45.0%

[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]					
2008	5,955	3,527	1,055	1,372	59.2%
2009	5,858	3,280	1,044	1,533	56.0%
2008 Q4	1,486	869	260	356	58.5%
2009 Q1	1,422	812	260	350	57.1%
2009 Q2	1,485	863	258	364	58.1%
2009 Q3	1,445	800	259	387	55.3%
2009 Q4	1,506	806	268	433	53.5%
Access					
2008	3,047	1,936	532	579	63.5%
2009	3,028	1,811	538	680	59.8%
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	750	441	134	176	58.8%
2009 Q4	758	429	135	194	56.7%
Calls[1]					
2008	2,908	1,592	523	793	54.7%
2009	2,830	1,470	506	854	51.9%
2008 Q4	715	392	127	196	54.8%
2009 Q1	685	358	126	202	52.2%
2009 Q2	701	377	123	201	53.8%
2009 Q3	695	359	125	211	51.6%
2009 Q4	748	376	133	239	50.3%

[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
2008	23,525	14,954	4,170	4,402	63.6%
2009	22,894	13,328	4,206	5,360	58.2%
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	23,216	13,694	4,182	5,341	59.0%
2009 Q4	22,894	13,328	4,206	5,360	58.2%

Table 8

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

	All Operators	BT[1]	Virgin Media	Other	BT share[1]
2008	99,428	49,180	16,717	33,531	49.5%
2009	94,165	41,586	15,039	37,540	44.2%
2008 Q4	24,083	11,601	4,109	8,373	48.2%
2009 Q1	24,259	11,354	4,031	8,874	46.8%
2009 Q2	22,978	10,179	3,664	9,135	44.3%
2009 Q3	23,020	9,963	3,642	9,415	43.3%
2009 Q4	23,908	10,090	3,702	10,116	42.2%

[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					
2008	868	508	138	222	58.5%
2009	918	518	148	252	56.5%
2008 Q4	220	131	34	56	59.4%
2009 Q1	221	126	36	59	57.1%
2009 Q2	220	128	34	59	58.0%
2009 Q3	222	124	36	62	55.7%
2009 Q4	255	141	42	72	55.3%
International calls					
2008	300	150	46	104	49.9%
2009	279	129	43	108	46.0%
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	69	31	11	27	45.5%
2009 Q4	70	31	11	29	44.2%
Calls to mobiles					
2008	943	448	180	314	47.5%
2009	879	395	158	326	44.9%
2008 Q4	227	107	42	78	47.2%
2009 Q1	216	101	40	76	46.5%
2009 Q2	218	101	40	77	46.5%
2009 Q3	219	98	40	82	44.7%
2009 Q4	226	95	39	92	42.1%
Other calls[1]					
2008	797	486	158	153	61.0%
2009	753	428	158	167	56.8%
2008 Q4	194	117	40	37	60.3%
2009 Q1	177	97	39	40	55.1%
2009 Q2	194	116	39	40	59.6%
2009 Q3	185	106	38	41	57.2%
2009 Q4	198	109	42	47	55.3%

[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					
2008	65,709	31,450	12,037	22,222	47.9%
2009	64,945	28,215	11,079	25,651	43.4%
2008 Q4	16,391	7,744	2,995	5,652	47.2%
2009 Q1	16,701	7,668	2,971	6,062	45.9%
2009 Q2	15,704	6,816	2,678	6,210	43.4%
2009 Q3	15,741	6,695	2,658	6,388	42.5%
2009 Q4	16,798	7,036	2,772	6,990	41.9%
International calls					
2008	3,787	1,243	307	2,237	32.8%
2009	4,075	1,171	289	2,615	28.7%
2008 Q4	963	314	75	574	32.6%
2009 Q1	1,000	309	74	617	30.9%
2009 Q2	1,017	291	71	655	28.6%
2009 Q3	1,020	280	70	670	27.5%
2009 Q4	1,039	291	74	674	28.0%
Calls to mobiles					
2008	6,762	3,505	981	2,276	51.8%
2009	6,241	2,869	792	2,580	46.0%
2008 Q4	1,603	813	226	564	50.7%
2009 Q1	1,548	760	210	578	49.1%
2009 Q2	1,547	728	202	617	47.1%
2009 Q3	1,561	704	195	662	45.1%
2009 Q4	1,585	677	185	723	42.7%
Other calls*					
2008	23,170	12,982	3,392	6,796	56.0%
2009	18,904	9,331	2,879	6,694	49.4%
2008 Q4	5,127	2,730	813	1,584	53.3%
2009 Q1	5,009	2,617	776	1,616	52.2%
2009 Q2	4,710	2,344	713	1,653	49.8%
2009 Q3	4,698	2,284	719	1,695	48.6%
2009 Q4	4,486	2,086	671	1,729	46.5%

[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 & Calls[1]					
2008	3,177	1,835	120	1,222	57.8%
2009	2,975	1,617	108	1,251	54.3%
2008 Q4	758	428	28	301	56.5%
2009 Q1	773	432	28	313	55.9%
2009 Q2	751	411	27	312	54.8%
2009 Q3	733	399	27	308	54.4%
2009 Q4	718	374	26	318	52.1%
Access					
2008	1,625	1,108	39	478	68.2%
2009	1,535	1,004	38	493	65.4%
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%
2009 Q4	374	237	10	127	63.5%
Calls[1]					
2008	1,552	727	81	744	46.8%
2009	1,440	612	70	758	42.5%
2008 Q4	366	166	19	181	45.3%
2009 Q1	380	170	19	191	44.7%
2009 Q2	363	155	18	191	42.6%
2009 Q3	353	151	17	185	42.7%
2009 Q4	345	137	16	191	39.8%

[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
2008	9,710	5,613	435	3,662	57.8%
2009	9,223	4,893	432	3,898	53.1%
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%
2009 Q4	9,223	4,893	432	3,898	53.1%

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]
2008	44,374	17,735	2,555	10,201	13,883	40.0%
2009	40,930	14,883	2,369	8,634	15,044	36.4%
2008 Q4	10,498	4,041	618	2,499	3,341	38.5%
2009 Q1	10,640	4,005	630	2,380	3,624	37.6%
2009 Q2	10,019	3,723	574	2,089	3,633	37.2%
2009 Q3	9,937	3,674	596	1,893	3,774	37.0%
2009 Q4	10,334	3,481	569	2,272	4,012	33.7%

[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					
2008	498	245	23	230	49.1%
2009	451	206	19	225	45.8%
2008 Q4	115	55	5	55	47.4%
2009 Q1	120	57	5	57	47.7%
2009 Q2	113	52	5	57	45.8%
2009 Q3	110	51	5	55	46.1%
2009 Q4	108	47	5	56	43.3%
International calls					
2008	254	102	6	146	40.1%
2009	234	82	5	148	35.0%
2008 Q4	61	23	1	36	38.3%
2009 Q1	62	23	1	38	37.6%
2009 Q2	60	21	1	38	35.0%
2009 Q3	57	20	1	36	34.5%
2009 Q4	56	18	1	36	32.7%
Calls to mobiles					
2008	591	270	39	282	45.6%
2009	566	246	36	284	43.5%
2008 Q4	140	64	9	67	46.0%
2009 Q1	149	67	9	72	45.0%
2009 Q2	141	61	9	71	43.5%
2009 Q3	139	62	9	69	44.2%
2009 Q4	137	57	9	72	41.3%
Other calls[1]					
2008	209	110	13	86	52.7%
2009	189	77	10	102	40.9%
2008 Q4	49	23	3	23	47.3%
2009 Q1	49	22	3	24	45.4%
2009 Q2	49	20	3	26	41.8%
2009 Q3	47	19	3	26	40.1%
2009 Q4	45	16	2	26	35.8%

[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 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						
2008	26,183	9,895	1,695	6,157	8,435	37.8%
2009	24,047	8,288	1,567	5,193	8,999	34.5%
2008 Q4	6,160	2,254	405	1,493	2,008	36.6%
2009 Q1	6,252	2,235	419	1,413	2,184	35.8%
2009 Q2	5,851	2,070	381	1,230	2,170	35.4%
2009 Q3	5,790	2,042	391	1,120	2,237	35.3%
2009 Q4	6,154	1,941	376	1,430	2,408	31.5%
International calls						
2008	2,385	608	59	1,233	485	25.5%
2009	2,114	538	49	997	530	25.4%
2008 Q4	561	141	14	294	111	25.2%
2009 Q1	565	143	12	277	133	25.3%
2009 Q2	525	135	12	250	128	25.7%
2009 Q3	493	127	14	220	131	25.8%
2009 Q4	532	133	11	250	137	25.0%
Calls to mobiles						
2008	6,514	2,760	347	1,106	2,302	42.4%
2009	6,205	2,386	332	959	2,527	38.5%
2008 Q4	1,556	638	83	276	559	41.0%
2009 Q1	1,600	637	86	272	605	39.8%
2009 Q2	1,517	596	81	235	605	39.3%
2009 Q3	1,518	593	84	206	634	39.1%
2009 Q4	1,571	560	81	246	684	35.7%
Other calls*						
2008	9,291	4,472	454	1,704	2,661	48.1%
2009	8,564	3,671	421	1,485	2,987	42.9%
2008 Q4	2,222	1,008	116	435	663	45.4%
2009 Q1	2,223	990	113	419	702	44.5%
2009 Q2	2,126	922	100	375	730	43.4%
2009 Q3	2,137	912	107	346	772	42.7%
2009 Q4	2,077	847	101	346	784	40.8%

[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 DSL	Virgin Media Cable	Other (inc. LLU)	BT retail share
2008	17,276	4,545	3,509	3,683	5,539	26.3%
2009	18,233	4,876	3,132	3,845	6,381	26.7%
2008 Q4	17,276	4,545	3,509	3,683	5,539	26.3%
2009 Q1	17,541	4,641	3,400	3,730	5,770	26.5%
2009 Q2	17,723	4,717	3,286	3,742	5,977	26.6%
2009 Q3	17,916	4,775	3,220	3,781	6,139	26.7%
2009 Q4	18,233	4,876	3,132	3,845	6,381	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 Q4 (October to December 2009)

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 (£m)[1]

	Vodafone[2]	O2[3]	T-Mobile	Orange[4]
Calls and other charges				
2008 Q4	766	744	577	685
2008 Q1	729	735	541	663
2009 Q2	717	769	544	638[5]
2009 Q3	715	814	559	642[5]
2009 Q4	708	799	554	653
SMS and MMS				
2008 Q4	187	278	103	107
2009 Q1	175	271	105	100
2009 Q2	184	269	102	82
2009 Q3	189	275	105	69
2009 Q4	205	281	98	78
Total				
2008 Q4	954	1,022	680	792
2009 Q1	904	1,006	645	763
2009 Q2	901	1,038	646	720[5]
2009 Q3	904	1,090	664	711[5]
2009 Q4	913	1,081	652	731

[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] Figures revised from previous publication of 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 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
2009 Q4	6,306	9,725	4,461	6,030
Outgoing international				
2008 Q4	127	191	48	81
2009 Q1	148	187	44	80
2009 Q2	147	210	44	83
2009 Q3	144	210	46	84
2009 Q4	127	215	47	85
While roaming abroad				
2008 Q4	147	143	32	72
2009 Q1	140	134	29	64
2009 Q2	169	166	36	75
2009 Q3	228	219	46	99[5]
2009 Q4	143	149	34	62
All calls				
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	5,972[5]
2009 Q4	6,576	10,089	4,542	6,177

[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.

[5] Figures revised from previous publication of tables.

Table 3

Volume of SMS and MMS (millions)

	Vodafone[1]	O2[2]	T-Mobile[3]	Orange[4]
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
2009 Q4	5,045	10,935	3,184	6,501

[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 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
2009 Q4	2,149	1,965	1,412	2,511
Subscribers at end of period				
Post-pay				
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
2009 Q4	8,413	8,666	4,071	6,903
Pre-pay				
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
2009 Q4	8,140	11,740	13,108	9,610
Total				
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
2009 Q4	16,553	20,406	17,178	16,514
Net change during period				
2008 Q4	44	390	-16	180
2009 Q1	-547	110	-101	-145
2009 Q2	-12	233	-96	3
2009 Q3	381	270	20	257
2009 Q4	166	323	571	404

[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 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	45.4[5]
2009 Q3	55.8	54.6	40.0	44.5[5]
2009 Q4	55.4	53.4	38.6	44.8

[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.

[5] Figures revised from previous publication of tables.

Table 6

Interconnection call volumes (millions of minutes)

	Vodafone[1]	O2[2]	T-Mobile[3]	Orange[4]
Call volumes				
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
2009 Q4	2,774	4,802	2,178	3,398

[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.