Telecommunications market data tables Q4 2011

1 – Market monitor

2 – Fixed telecoms market data tables

3 – Mobile telecoms market data tables

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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.

Fixed voice

- Total fixed line telephony revenues were £2.2 billion in 2011 Q4, 4.9% lower than in 2010 Q4. Over the same period, access revenues increased by 6.0% while call revenues fell by 17.5%, a reflection of increasing take-up of line rental tariffs which include bundled calls.

- Total fixed-line call volumes fell by 12.0% to 28.0 billion minutes in the year to 2011 Q4, with the rate of decline in residential call volumes (13.3%) being higher than that in the business market (9.1%).

- At the end of 2011 there were 33.2 million UK fixed lines, 179k less than a year previously as a result of a 299k fall in the number of business lines. The total number of residential lines increased by 120k over the same period, partly as a result of a fixed line being required to access DSL broadband services.

Fixed broadband

- At the end of 2011 Q4 there were 20.4 million UK non-corporate UK broadband connections, 1.3 million (6.8%) more than there had been at the end of 2010.

- BT remained the largest UK retail broadband provider during the quarter, its market share increasing by 0.1 percentage points to 29.3%, 1.1 percentage points higher than it had been a year previously.

Mobile

- Mobile telephony services generated 0.9% more retail revenue in 2011 Q4 than the same quarter the previous year, resulting in the annual figure for 2011 rising by 1.0% compared with 2010 – the first annual rise since 2008.

- Call volumes fell when comparing both 2011 Q4 with 2010 Q4 and 2011 with 2010 – by 2.0% and 1.1% respectively. This contrasts with the fact that call volumes increased every year from 2003 to 2010. Volumes of SMS and MMS increased 17.2% from 2010 to 2011.

- The number of active mobile subscribers rose by 0.2% from 2011 Q3 to 2011 Q4, and 0.6% from 2010 Q4 to 2011 Q4, bringing the figure to 81.6 million. The number of active mobile broadband (dongle and datacard) subscribers in 2011 Q4 had increased 4.9% compared with one year earlier – to 5.1 million.

2. Fixed telecoms market data tables

Q4 2011 (October to December 2011)

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

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2010	9,407	4,714	1,164	3,529	50.1%
2011	8,948	4,313	1,073	3,562	48.2%
2010 Q4	2,331	1,158	293	880	49.7%
2011 Q1	2,298	1,117	274	907	48.6%
2011 Q2	2,234	1,085	275	874	48.6%
2011 Q3	2,198	1,053	261	883	47.9%
2011 Q4	2,218	1,058	263	898	47.7%
Access					
2010	5,003	2,837	602	1,563	56.7%
2011	5,155	2,724	617	1,814	52.8%
2010 Q4	1,255	691	153	412	55.0%
2011 Q1	1,286	693	151	442	53.9%
2011 Q2	1,267	683	159	425	53.9%
2011 Q3	1,272	666	149	457	52.3%
2011 Q4	1,330	683	157	490	51.4%
Calls[1]					
2010	4,404	1,877	562	1,965	42.6%
2011	3,793	1,589	456	1,748	41.9%
2010 Q4	1,076	468	140	468	43.4%
2011 Q1	1,012	424	123	464	41.9%
2011 Q2	968	403	116	449	41.6%
2011 Q3	926	388	112	426	41.9%
2011 Q4	888	374	105	408	42.2%

[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
2010	33,409	17,023	4,940	11,447	51.0%
2011	33,230	15,750	4,893	12,588	47.4%
2010 Q4	33,409	17,023	4,940	11,447	51.0%
2011 Q1	33,300	16,683	4,955	11,662	50.1%
2011 Q2	33,265	16,403	4,921	11,941	49.3%
2011 Q3	33,216	16,022	4,880	12,314	48.2%
2011 Q4	33,230	15,750	4,893	12,588	47.4%

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]
2010	130,202	49,834	15,833	22,885	41,650	38.3%
2011	116,764	43,364	13,867	24,769	34,764	37.1%
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%
2011 Q3	28,588	10,666	3,372	5,966	8,584	37.3%
2011 Q4	28,025	10,386	3,377	6,133	8,129	37.1%

[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]
2010	4,404	1,328	474	1,477	1,126
2011	3,793	1,156	403	1,243	992
2010 Q4	1,076	338	115	356	268
2011 Q1	1,012	309	108	335	260
2011 Q2	968	289	101	315	262
2011 Q3	926	284	98	305	240
2011 Q4	888	274	95	289	230

[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						
2010	88,362	33,102	11,648	15,294	28,318	37.5%
2011	79,155	29,302	10,208	16,353	23,293	37.0%
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%
2011 Q3	19,239	7,155	2,461	3,921	5,702	37.2%
2011 Q4	19,104	7,098	2,505	4,014	5,487	37.2%
International calls						
2010	7,197	1,605	328	2,474	2,789	22.3%
2011	6,871	1,386	302	2,779	2,404	20.2%
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%
2011 Q3	1,616	329	72	593	622	20.4%
2011 Q4	1,600	316	73	703	509	19.7%
Calls to mobiles						
2010	11,846	4,538	975	1,649	4,684	38.3%
2011	10,420	3,922	848	1,785	3,865	37.6%
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%
2011 Q3	2,582	986	211	435	950	38.2%
2011 Q4	2,473	936	209	432	896	37.8%
Other calls[1]						
2010	22,797	10,589	2,882	3,467	5,858	46.4%
2011	20,318	8,754	2,509	3,852	5,203	43.1%
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%
2011 Q3	5,150	2,196	628	1,017	1,309	42.6%
2011 Q4	4,847	2,036	590	984	1,237	42.0%

[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]					
2010	6,160	3,055	1,061	2,044	49.6%
2011	5,889	2,741	976	2,172	46.5%
2010 Q4	1,558	759	267	532	48.7%
2011 Q1	1,496	708	249	539	47.3%
2011 Q2	1,443	685	251	507	47.5%
2011 Q3	1,463	673	238	553	46.0%
2011 Q4	1,488	676	239	573	45.4%
Access					
2010	3,259	1,697	563	999	52.1%
2011	3,389	1,594	576	1,219	47.0%
2010 Q4	827	413	142	272	49.9%
2011 Q1	822	400	141	281	48.7%
2011 Q2	819	396	149	274	48.3%
2011 Q3	851	395	139	317	46.3%
2011 Q4	897	404	147	346	45.0%
Calls[1]					
2010	2,901	1,358	498	1,045	46.8%
2011	2,500	1,147	400	953	45.9%
2010 Q4	731	346	125	259	47.4%
2011 Q1	673	307	108	258	45.6%
2011 Q2	625	289	102	233	46.3%
2011 Q3	612	278	98	235	45.5%
2011 Q4	590	272	91	227	46.1%

[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
2010	23,752	12,043	4,313	7,395	50.7%
2011	23,872	11,123	4,299	8,449	46.6%
2010 Q4	23,752	12,043	4,313	7,395	50.7%
2011 Q1	23,658	11,825	4,336	7,497	50.0%
2011 Q2	23,727	11,576	4,323	7,828	48.8%
2011 Q3	23,755	11,302	4,294	8,160	47.6%
2011 Q4	23,872	11,123	4,299	8,449	46.6%

Table 8

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

	All Operators	BT[1]	Virgin Media	Other	BT share[1]
2010	90,361	36,189	13,632	40,540	40.0%
2011	80,354	31,106	11,791	37,457	38.7%
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%
2011 Q3	19,490	7,606	2,858	9,026	39.0%
2011 Q4	19,331	7,470	2,855	9,006	38.6%

[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]
2010	2,901	935	293	849	824
2011	2,500	817	240	708	735
2010 Q4	731	246	73	207	204
2011 Q1	673	220	66	189	198
2011 Q2	625	202	60	179	183
2011 Q3	612	199	58	174	180
2011 Q4	590	195	56	165	174

[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					
2010	65,134	25,620	10,195	29,319	39.3%
2011	58,181	22,570	8,867	26,744	38.8%
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%
2011 Q3	14,027	5,485	2,130	6,412	39.1%
2011 Q4	14,123	5,509	2,170	6,444	39.0%
International calls					
2010	4,850	1,053	284	3,513	21.7%
2011	4,674	890	261	3,523	19.0%
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%
2011 Q3	1,073	210	63	800	19.6%
2011 Q4	1,066	203	64	799	19.0%
Calls to mobiles					
2010	5,642	2,324	648	2,670	41.2%
2011	4,704	1,852	528	2,324	39.4%
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%
2011 Q3	1,149	463	131	555	40.3%
2011 Q4	1,101	437	127	537	39.7%
Other calls*					
2010	14,736	7,192	2,505	5,039	48.8%
2011	12,794	5,794	2,135	4,865	45.3%
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%
2011 Q3	3,242	1,448	534	1,260	44.7%
2011 Q4	3,040	1,321	494	1,225	43.4%

[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]					
2010	3,197	1,609	103	1,485	50.3%
2011	2,998	1,531	97	1,369	51.1%
2010 Q4	762	388	26	349	50.9%
2011 Q1	793	399	26	368	50.4%
2011 Q2	760	390	24	346	51.3%
2011 Q3	724	370	24	331	51.1%
2011 Q4	721	372	24	325	51.6%
Access					
2010	1,743	1,140	39	564	65.4%
2011	1,766	1,130	41	595	64.0%
2010 Q4	428	278	10	140	65.0%
2011 Q1	464	292	10	161	63.0%
2011 Q2	448	287	10	151	64.1%
2011 Q3	421	271	10	140	64.5%
2011 Q4	433	279	10	144	64.5%
Calls[1]					
2010	1,453	469	64	921	32.3%
2011	1,232	402	57	774	32.6%
2010 Q4	334	110	15	209	32.9%
2011 Q1	329	107	15	206	32.6%
2011 Q2	312	103	14	195	33.0%
2011 Q3	304	99	14	191	32.6%
2011 Q4	287	92	14	181	32.1%

[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
2010	9,658	4,980	627	4,052	51.6%
2011	9,359	4,627	593	4,138	49.4%
2010 Q4	9,658	4,980	627	4,052	51.6%
2011 Q1	9,641	4,858	619	4,165	50.4%
2011 Q2	9,538	4,827	598	4,113	50.6%
2011 Q3	9,461	4,720	586	4,154	49.9%
2011 Q4	9,359	4,627	593	4,138	49.4%

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]
2010	39,728	13,531	2,201	8,375	15,621	34.1%
2011	36,334	12,182	2,076	8,213	13,864	33.5%
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%
2011 Q3	9,076	3,039	514	2,099	3,424	33.5%
2011 Q4	8,677	2,900	522	2,002	3,254	33.4%

[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]
2010	1,453	393	181	628	252
2011	1,232	339	162	535	195
2010 Q4	334	92	42	149	52
2011 Q1	329	89	42	146	52
2011 Q2	312	87	41	136	49
2011 Q3	304	84	40	130	49
2011 Q4	287	80	39	124	45

[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						
2010	23,229	7,482	1,453	4,894	9,400	32.2%
2011	20,974	6,732	1,341	4,770	8,131	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%
2011 Q3	5,212	1,670	331	1,216	1,995	32.0%
2011 Q4	4,981	1,589	335	1,162	1,895	31.9%
International calls						
2010	2,346	551	44	923	828	23.5%
2011	2,197	496	41	845	815	22.6%
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%
2011 Q3	543	119	9	214	201	21.9%
2011 Q4	534	113	9	213	199	21.2%
Calls to mobiles						
2010	6,205	2,214	327	956	2,707	35.7%
2011	5,717	2,071	320	970	2,355	36.2%
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%
2011 Q3	1,433	523	80	249	581	36.5%
2011 Q4	1,373	500	82	242	548	36.4%
Other calls*						
2010	7,948	3,284	377	1,602	2,684	41.3%
2011	7,448	2,883	374	1,628	2,562	38.7%
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%
2011 Q3	1,888	727	94	420	646	38.5%
2011 Q4	1,789	698	96	385	611	39.0%

[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 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
2010	19,130	7,484	7,489	4,028	130	28.2%
2011	20,438	7,960	7,946	4,120	412	29.3%
2010 Q4	19,130	7,484	7,489	4,028	130	28.2%
2011 Q1	19,452	7,587	7,608	4,078	179	28.5%
2011 Q2	19,781	7,929	7,580	4,065	207	28.7%
2011 Q3	20,052	7,939	7,725	4,090	298	29.1%
2011 Q4	20,438	7,960	7,946	4,120	412	29.3%

[1] Figures exclude corporate broadband connections. Connection numbers have been adjusted to exclude corporate broadband based on Ofcom estimates. Figures have been amended as a result of previous double-counting of some lines classed as “non-LLU ADSL” and the omission of FTTC connections from the previously published BT Retail figures

3. Mobile telecoms market data tables

Q4 2011 (October to December 2011)

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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 (£millions)

	Total	Access and bundled services	UK fixed calls	On-net mobile calls	Off-net mobile calls	Int'l calls	Other calls	Data services
2010	14,913	6,415	638	607	1,228	353	1,355	1,731
2011	15,060	6,582	563	526	1,062	352	1,422	2,038
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	3,751	1,617	140	131	268	89	367	522
2011 Q3	3,858	1,664	139	130	270	92	397	533
2011 Q4	3,792	1,681	141	127	266	85	335	525

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
2010	124,947	31,999	44,528	38,074	2,051	1,877	6,419	129,012
2011	123,561	31,397	41,585	40,873	2,086	1,841	5,778	151,212
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	1,553	36,876
2011 Q2	30,730	7,811	10,215	10,340	522	477	1,365	36,952
2011 Q3	30,890	7,849	10,107	10,443	532	568	1,392	37,514
2011 Q4	30,925	7,749	10,278	10,535	514	382	1,469	39,870

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[1]
2010	33,472	81,165	37,126	44,039	45.7%	4,818
2011	30,970	81,612	40,162	41,446	49.2%	5,056
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
2011 Q2	7,476	81,234	38,535	42,695	47.4%	4,971
2011 Q3	7,854	81,431	39,073	42,355	48.0%	5,046
2011 Q4	8,303	81,612	40,162	41,446	49.2%	5,056

[1] Refers to datacard and dongle connections (i.e. excludes mobile phone subscriptions); 2011 figures include 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
2010	15.47	26.24	6.86
2011	15.43	25.14	6.56
2010 Q4	15.53	25.88	6.94
2011 Q1	15.04	25.29	6.29
2011 Q2	15.40	25.47	6.51
2011 Q3	15.81	25.86	6.64
2011 Q4	15.51	24.92	6.61

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
2010	56,177
2011	58,963
2010 Q4	13,944
2011 Q1	14,500
2011 Q2	14,718
2011 Q3	14,857
2011 Q4	14,888[1]

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

[1] Includes Ofcom estimates.