Figure 6.1 Key telecoms indicators, 2011

	UK	FRA	GER	ITA	USA	CAN	JPN	AUS
Telecoms service revenues (£bn)	27.3	31.2	35.6	23.7	186.0	21.4	90.3	17.2
Telecoms revenues per capita (£)	436	476	437	389	598	629	708	790
Fixed lines per 100 population	53.0	28.4	52.2	27.4	45.8	53.5	32.9	48.5
Monthly outbound fixed minutes per capita	154	143	196	112	137	-	54	170
Mobile connections per 100 population	130	105	140	159	103	80	98	136
Share of mobile post-pay connections	49	71	44	17	85	79	99	49
3G connections per 100 population	-	42	35	61	57	32	97	83
Monthly outbound mobile minutes per capita	164	135	109	186	615	344	95	329
Fixed broadband connections per 100 population	32.6	34.7	34.3	22.2	28.9	33.1	27.4	25.9
DSL as a proportion of fixed broadband connections	78%	92%	84%	97%	36%	38%	20%	81%
FTTx as a proportion of fixed broadband connections	0.6%	2.2%	0.5%	2.6%	7.9%	0.2%	58.0%	0.3%
Mobile broadband connections per 100 population	8.0	4.8	6.6	10.1	47.1	3.5	7.8	25.2
VoIP subscriptions per 100 population	6.6	31.4	11.4	14.3	11.5	12.9	21.8	22.0

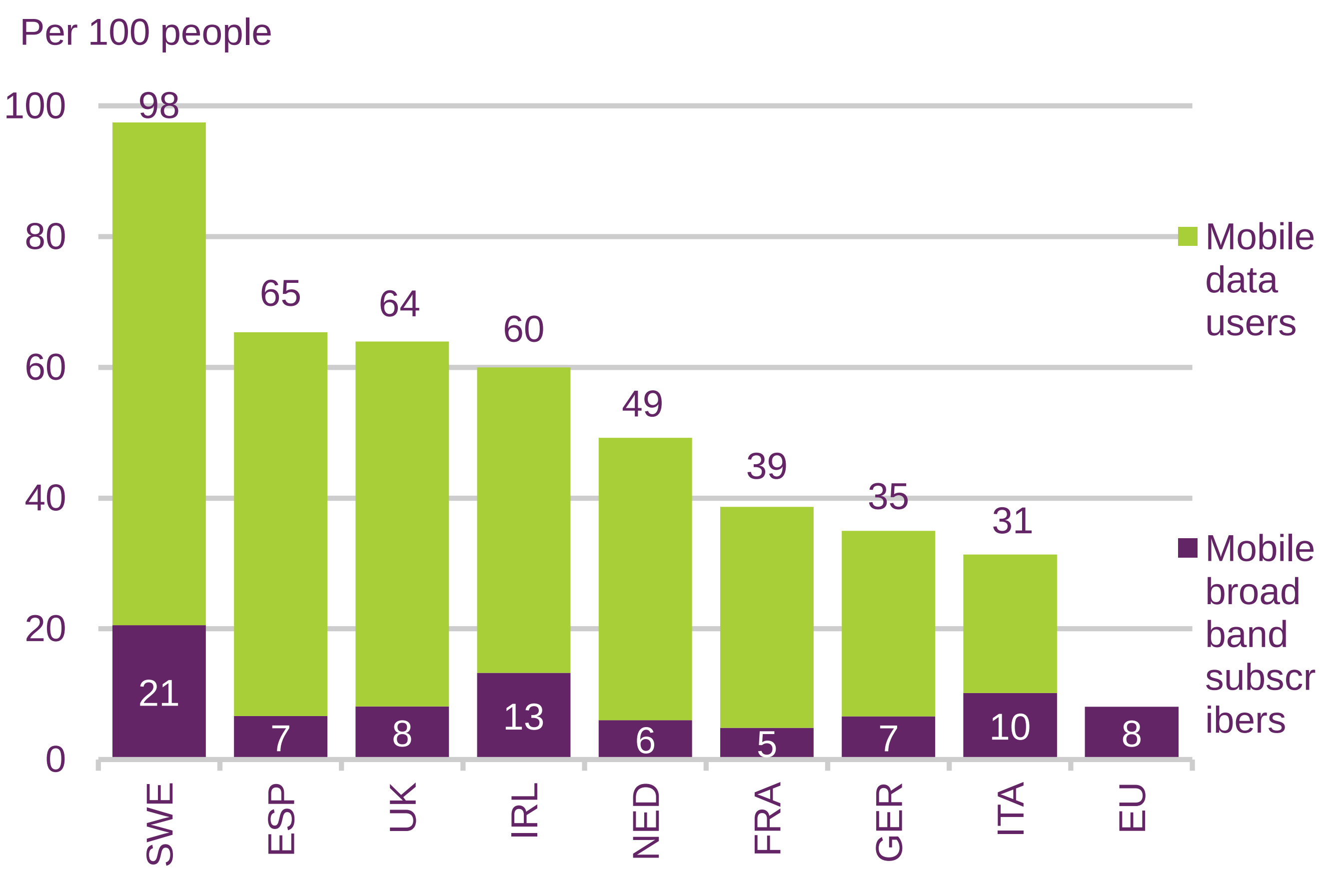
	ESP	NED	SWE	IRL	POL	BRA	RUS	IND	CHN
Telecoms service revenues (£bn)	19.2	9.0	4.5	2.2	5.6	35.6	18.7	10.7	71.4
Telecoms revenues per capita (£)	411	534	499	471	145	180	134	9	53
Fixed lines per 100 population	42.1	27.2	58.4	37.8	17.8	21.7	31.7	2.7	21.3
Monthly outbound fixed minutes per capita	114	106	163	120	32	76	95	-	11
Mobile connections per 100 population	126	121	153	123	131	123	164	75	74
Share of mobile post-pay connections	65	55	66	37	47	18	4	3	34
3G connections per 100 population	79	37	92	90	41	17	9	3	10
Monthly outbound mobile minutes per capita	126	123	213	197	138	131	214	72	312
Fixed broadband connections per 100 population	23.6	41.0	32.7	22.9	16.8	8.4	17.1	1.1	11.7
DSL as a proportion of fixed broadband connections	78%	50%	51%	68%	44%	63%	40%	87%	74%
FTTx as a proportion of fixed broadband connections	0.5%	3.4%	20%	0.9%	0.4%	0.1%	21%	0.2%	10%
Mobile broadband connections per 100 population	7.2	6.3	21.3	12.7	8.7	-	-	-	-
VoIP subscriptions per 100 population	3.1	24.7	14.5	4.5	2.2	-	-	-	-

Source: IDATE / industry data / Ofcom

Note: Fixed voice figures for CAN and USA exclude local calls; fixed lines cover only exchange lines and exclude "pure" VoIP accesses; USA, CAN and CHN mobile use includes both outbound and inbound calls; 3G includes W-CDMA and CDMA20000 1xEV-DO but not CDMA2000; BRIC country revenues exclude fixed broadband

Figure 6.2

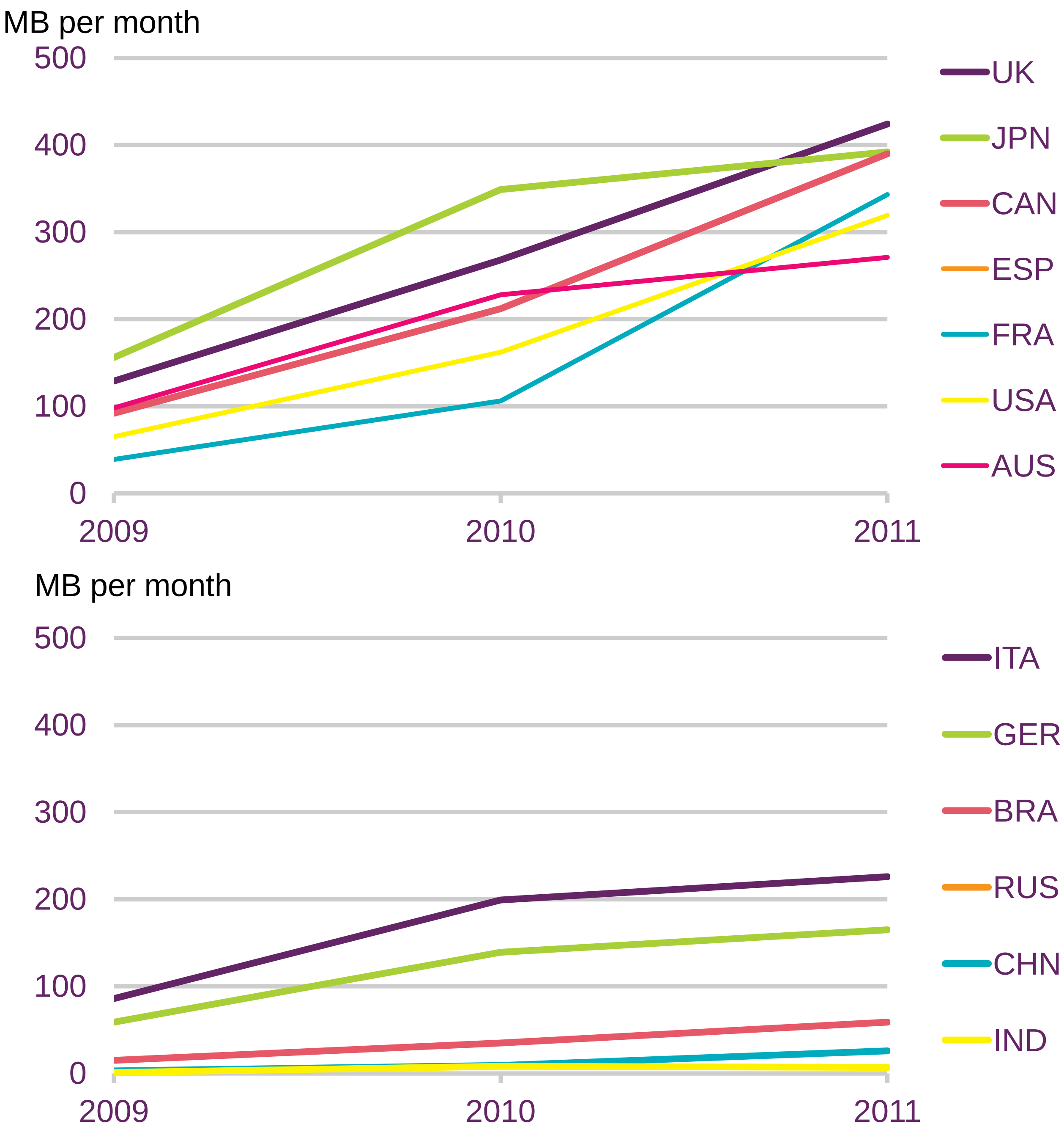
Mobile broadband subscribers and mobile data users per 100 people, 2011



Source: European Commission Digital Agenda Scoreboard. Mobile broadband subscribers refers to connections made over a mobile network by a PC or tablet with a dongle or with an embedded SIM. Mobile data users includes mobile broadband subscribers.

Figure 6.3

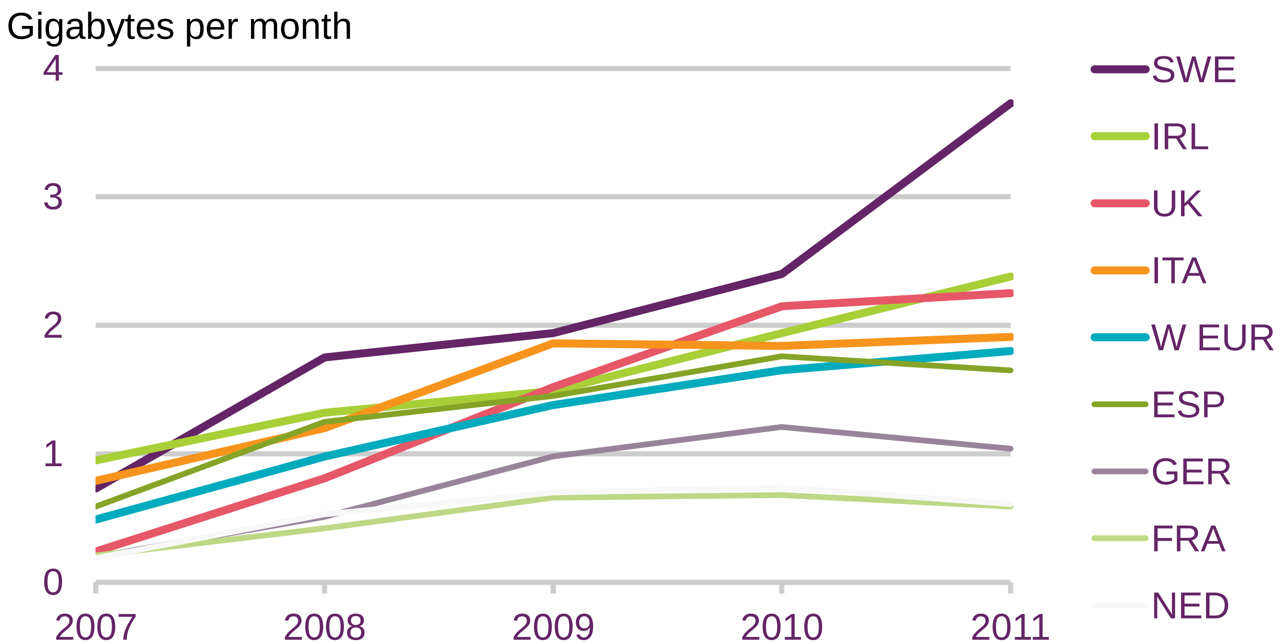
Mobile traffic volume per connection, 2009-2011



Source: Cisco Systems' Visual Networking Index. 2009 and 2010 data as provided to Ofcom by Cisco Systems in November 2011; 2011 data as published on the Cisco VNI microsite, October 2012. Data are for December of the year stated.

Figure 6.4

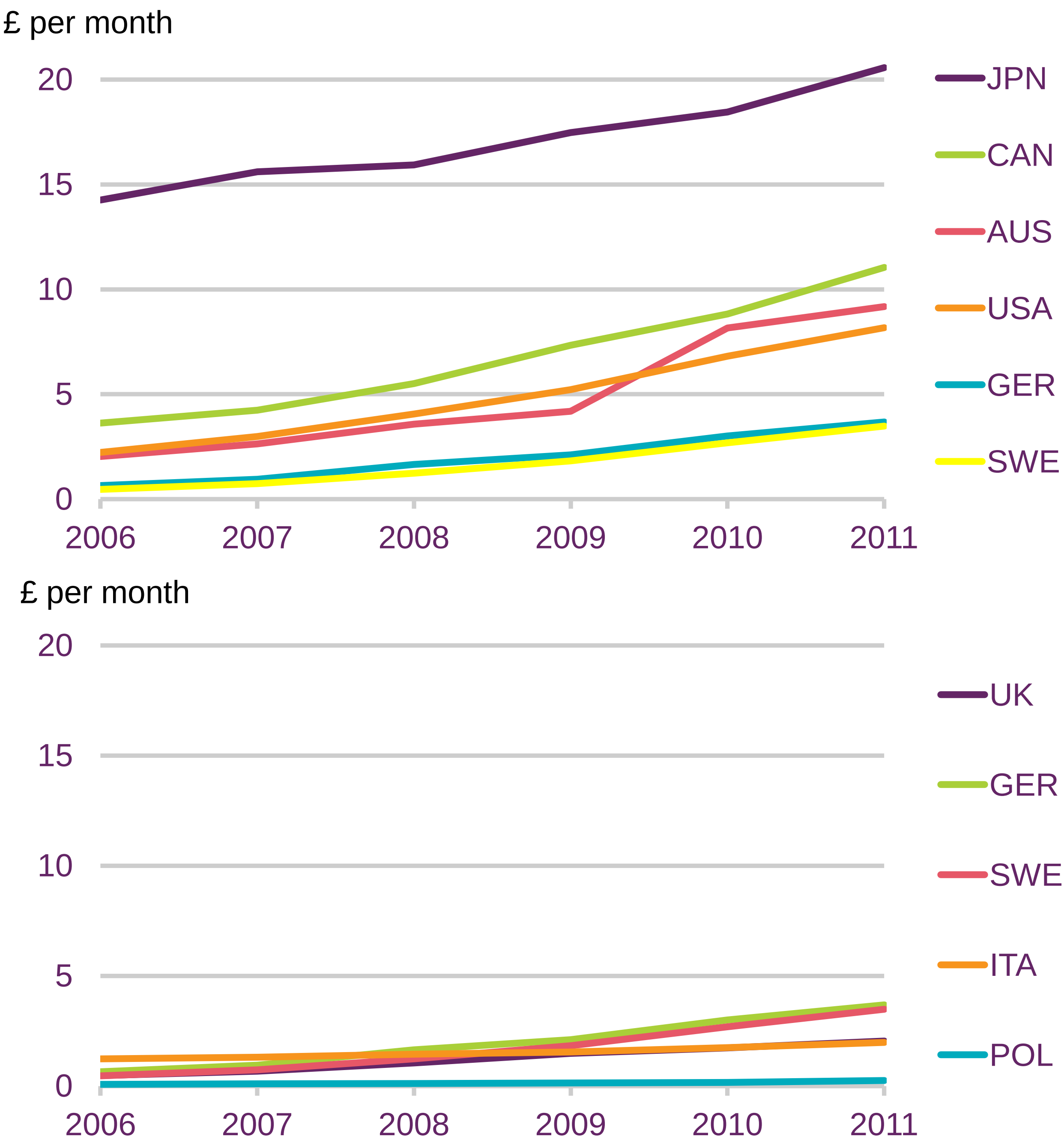
Mobile broadband data usage per SIM, 2007-2011



Source: Analysys Mason, May 2012, Wireless Network Traffic Worldwide: forecasts and analysis 2012-2017

Figure 6.5

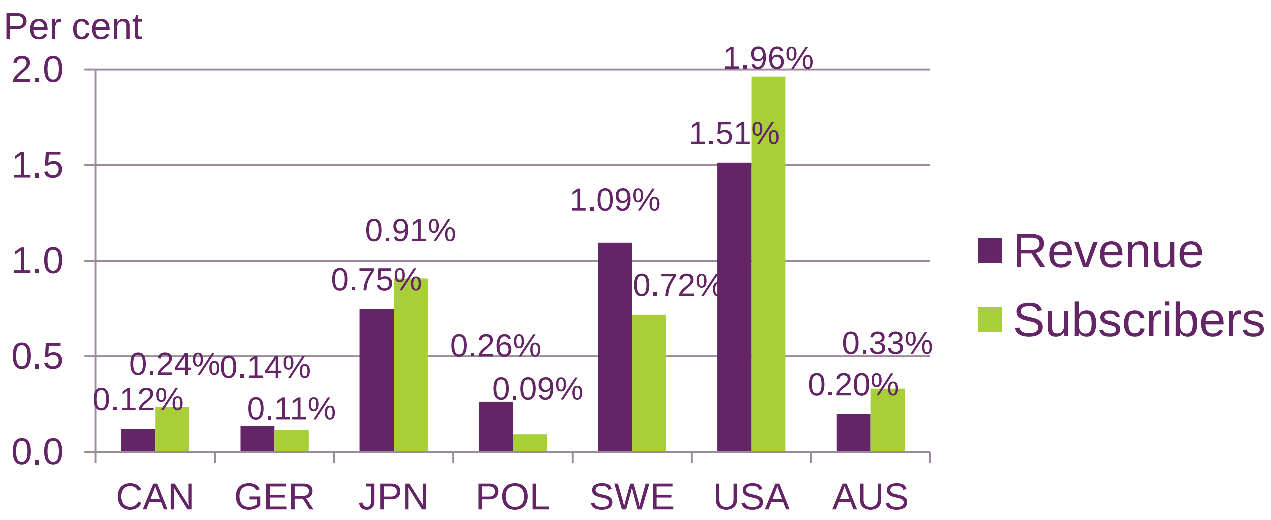
Mobile data average revenue per user: 2006-2011



Source: IDATE / industry data / Ofcom

Figure 6.6

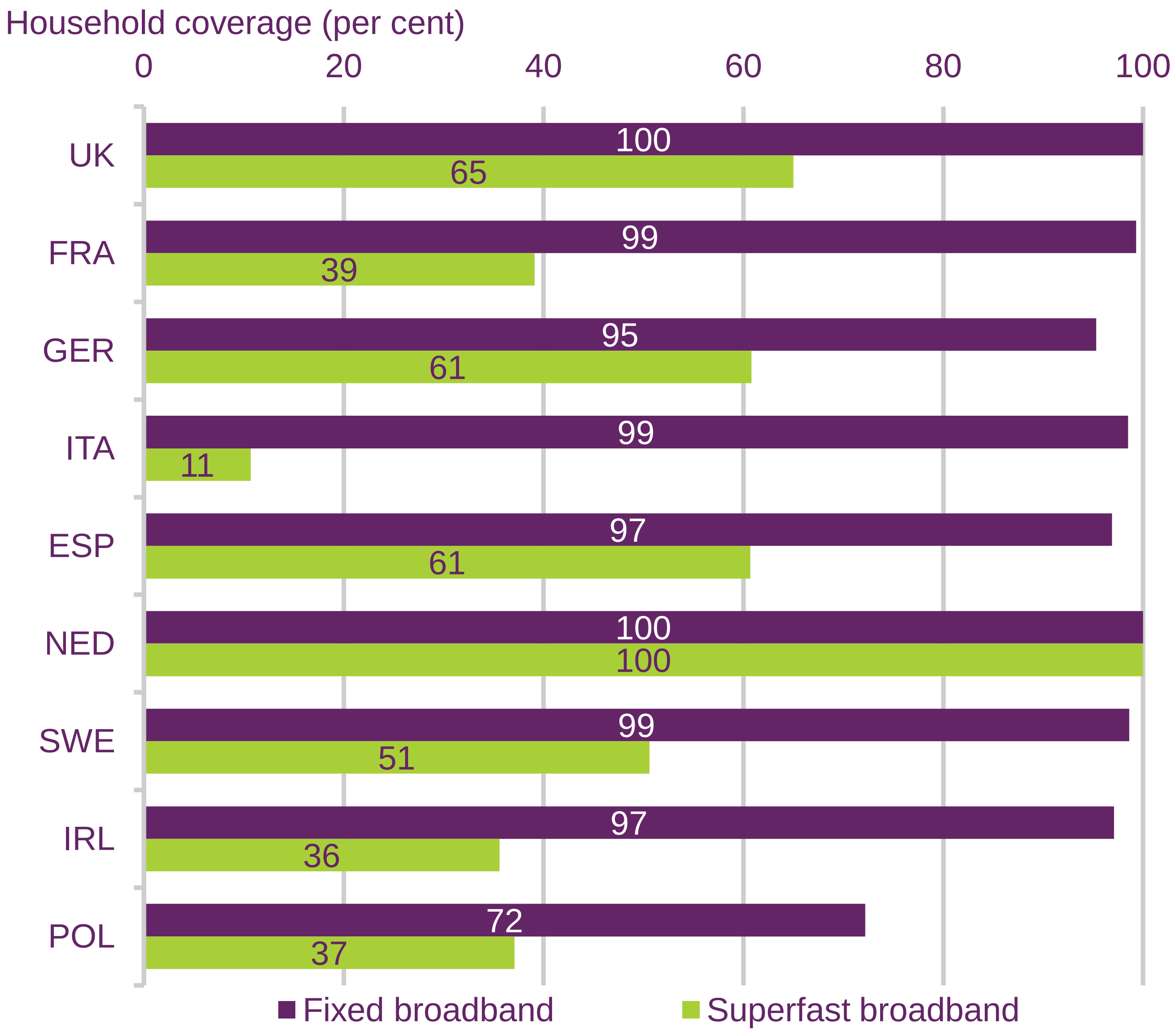
Percentage of revenues and subscribers attributable to LTE: 2011



Source: IDATE. Subscriber numbers are for the end of 2011. Revenue figures are for the whole of 2011.

Figure 6.7

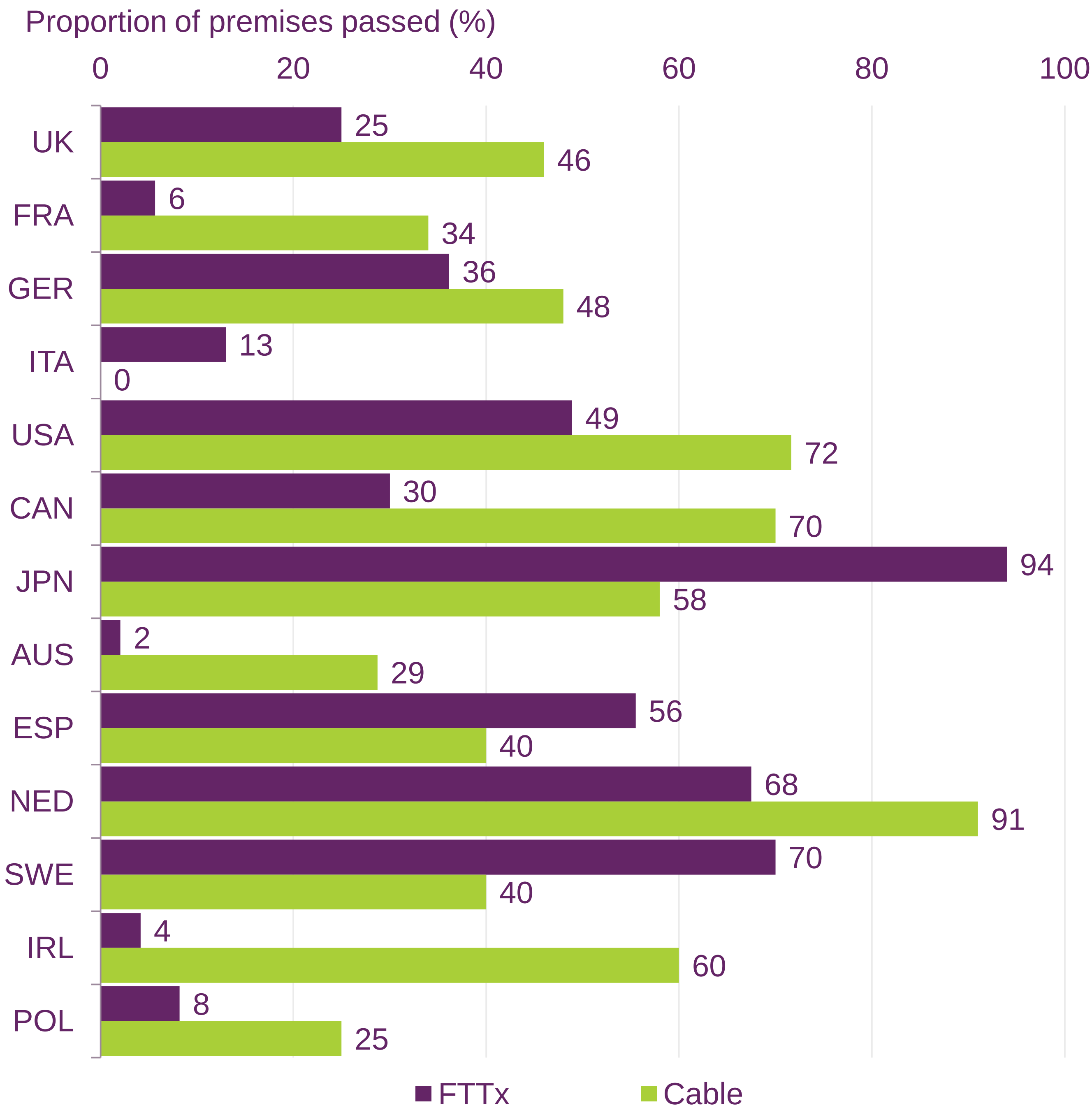
Fixed broadband availability, July 2012



Source: European Commission Study on broadband coverage 2011, November 2012 / Ofcom
Note: Figures are rounded to the nearest one per cent: therefore, an availability figure of 100% does not mean that coverage is available to all households.

Figure 6.8

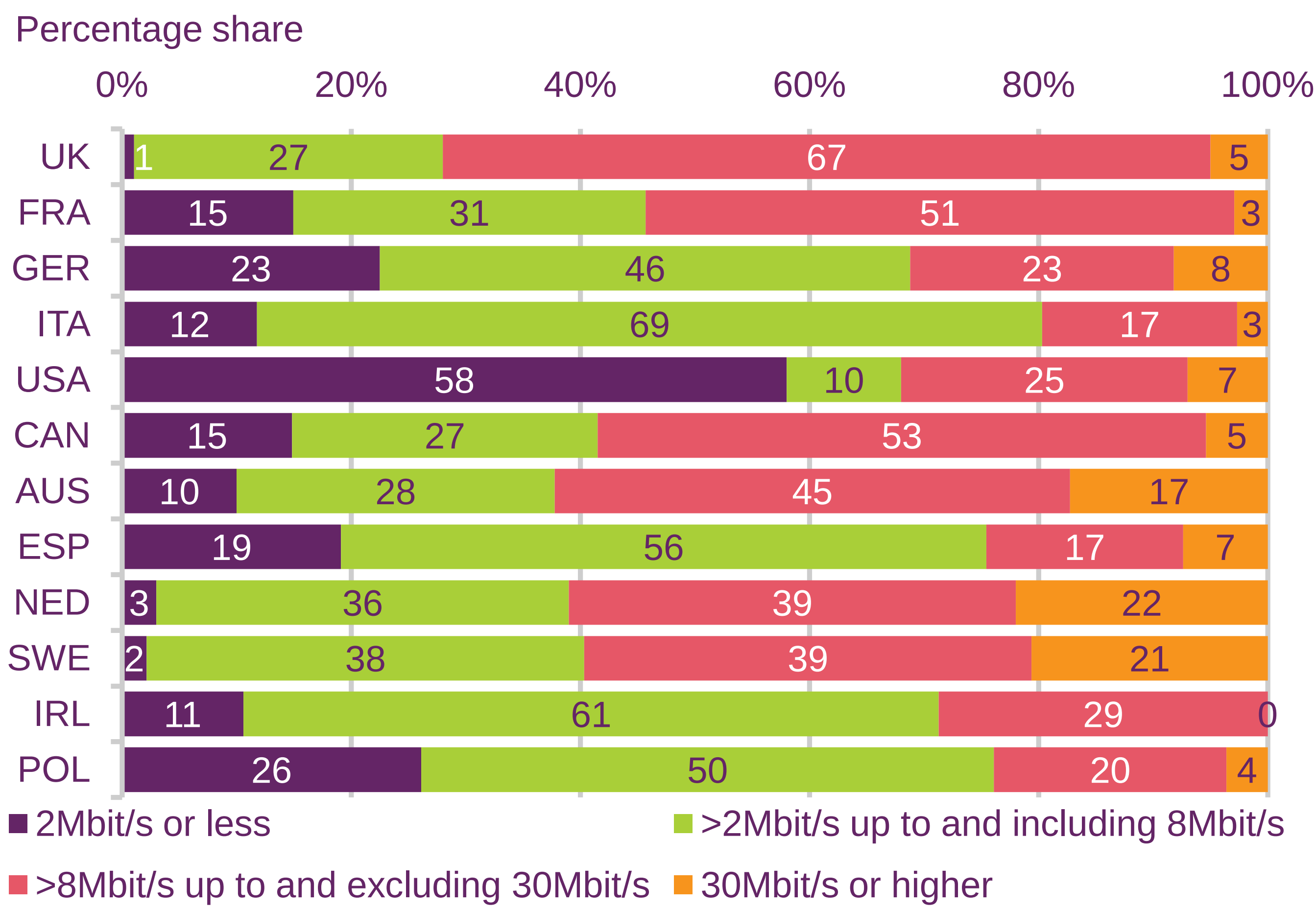
Availability of FTTx and cable networks, end 2011



Source: Analysys Mason, FTTX rollout and CAPEX in developed economies, forecasts 2012-2017, March 2012 / Ofcom
Note: UK figures are household availability

Figure 6.9

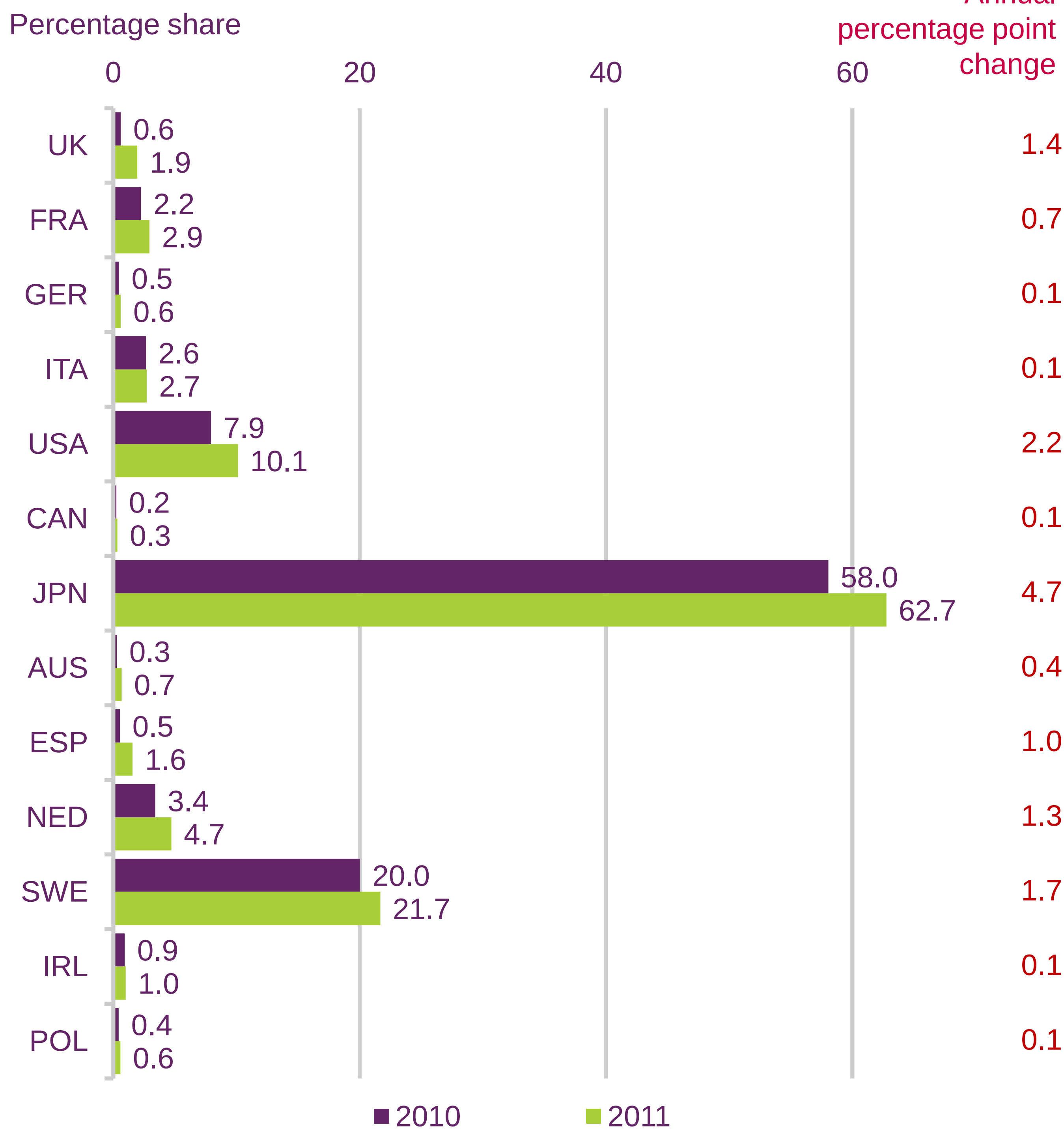
Proportion of total fixed broadband connections by headline speed



Source: Ofcom / IDATE

Figure 6.10

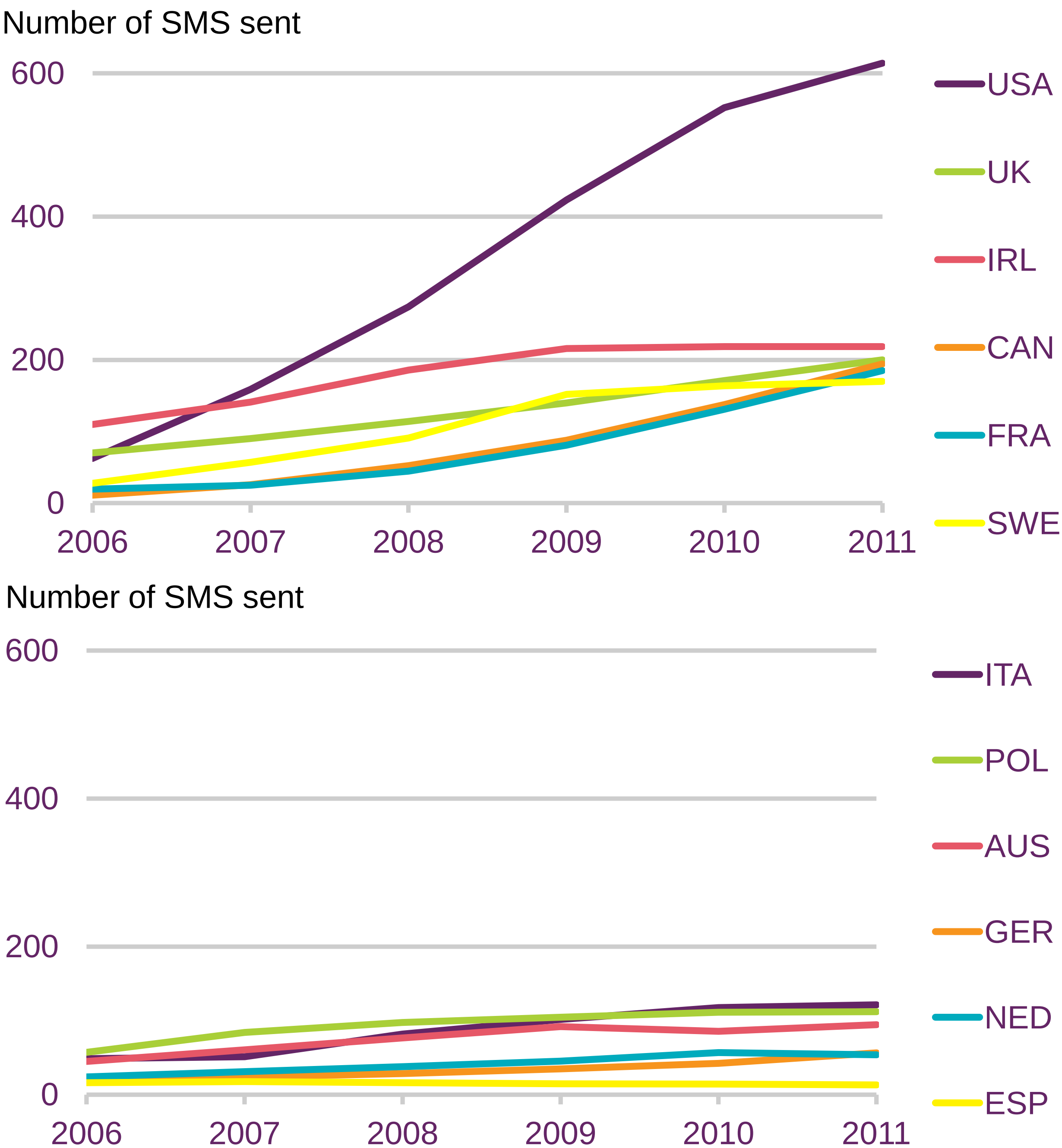
Fibre-based connections as a proportion of all fixed broadband connections, 2010 and 2011



Source: IDATE / industry data / Ofcom

Figure 6.11

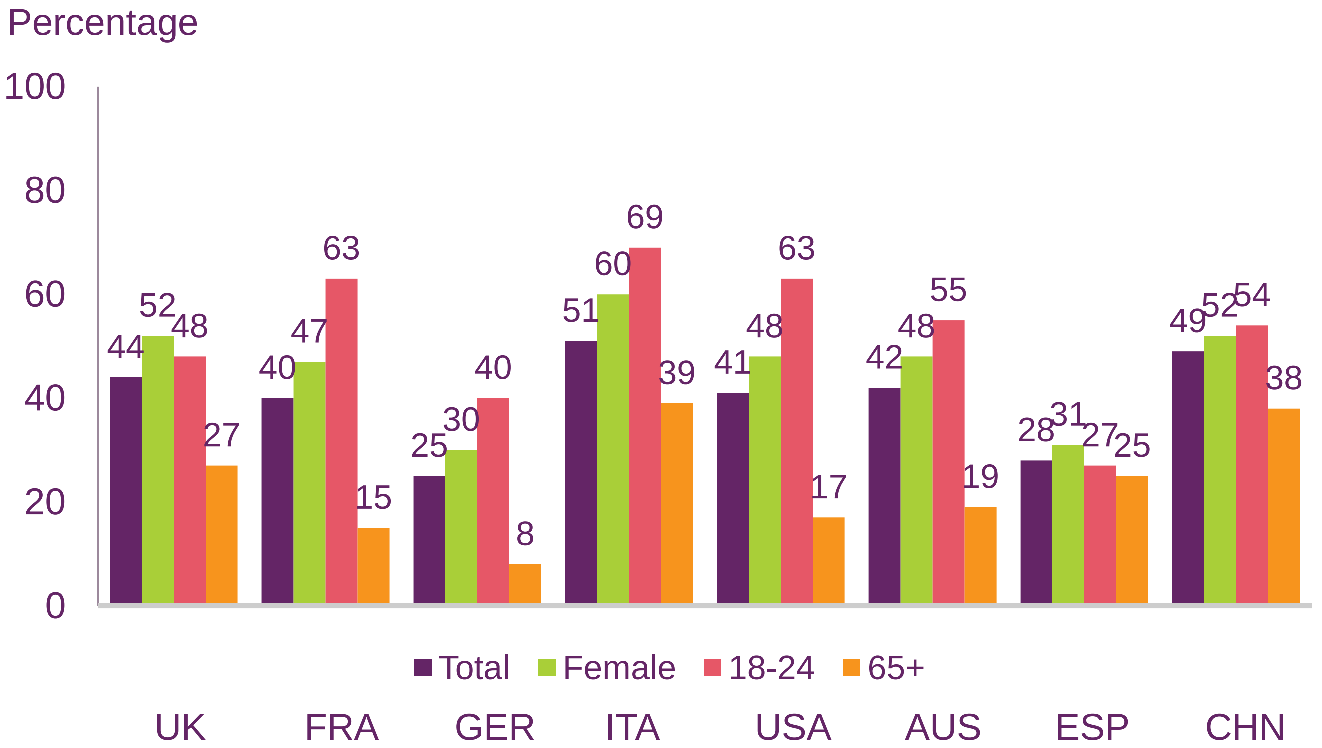
Volume of SMS messages sent per person per month: 2006-2011



Source: IDATE / industry data / Ofcom.
Note: USA figures include push-to-text and are not directly comparable to figures for the other countries.

Figure 6.12

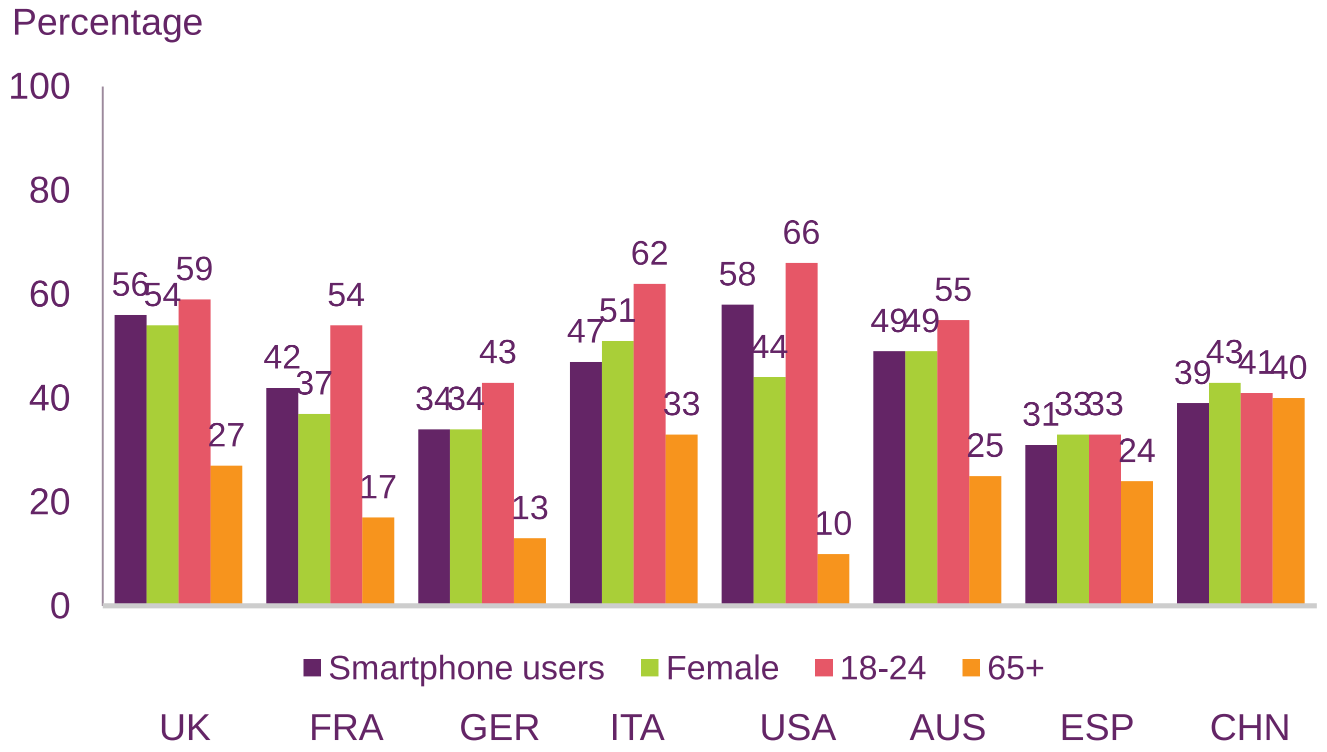
Percentage of respondents who sent text messages at least once a day, including splits by female, 18-24 years old and 65 years and older



Source: Ofcom consumer research.
Note: Due to sample sizes, age splits should be treated with caution.

Figure 6.13

Proportion of users who said the statement that they sent texts instead of making phone calls because it was easier ‘applied’ or ‘totally applied’ to them



Source: Ofcom consumer research.
Note: Due to sample sizes, age splits should be treated with caution.

Figure 6.14

Most frequently cited reasons for increasing SMS use

	Top reason	%	Second reason	%	Third reason	%	Fourth reason	%	Fifth reason	%
UK	Easy	59	Convenient	58	Immediate	56	Friends	48	Cheaper	36
FRA	Convenient	56	Immediate	54	Easy	53	Cheaper	36	Friends	27
GER	Convenient	55	Easy	50	Friends	31	Cheaper	21	Immediate	19
ITA	Immediate	57	Easy	51	Friends	33	Convenient	29	Cheaper	24
USA	Convenient	67	Immediate	60	Easy	56	Friends	53	Interactive	26
AUS	Convenient	67	Easy	64	Immediate	57	Friends	43	Cheaper	37
ESP	Convenient	52	Immediate	49	Easy	45	Friends	27	Cheaper	23
CHN	Easy	64	Convenient	61	Immediate	61	Cheaper	35	Interactive	30

Source: Ofcom consumer research
Base: all respondents who said they send more text messages than two years ago. Options given were: It’s convenient, It’s easy to use (in table: “Easy”); It’s immediate; It’s what my friends and family are using (in table: “Friends”); It’s cheaper than the alternative; It’s interactive; It’s more personal; It’s the only method available to me; Other; Don’t know.

Figure 6.15

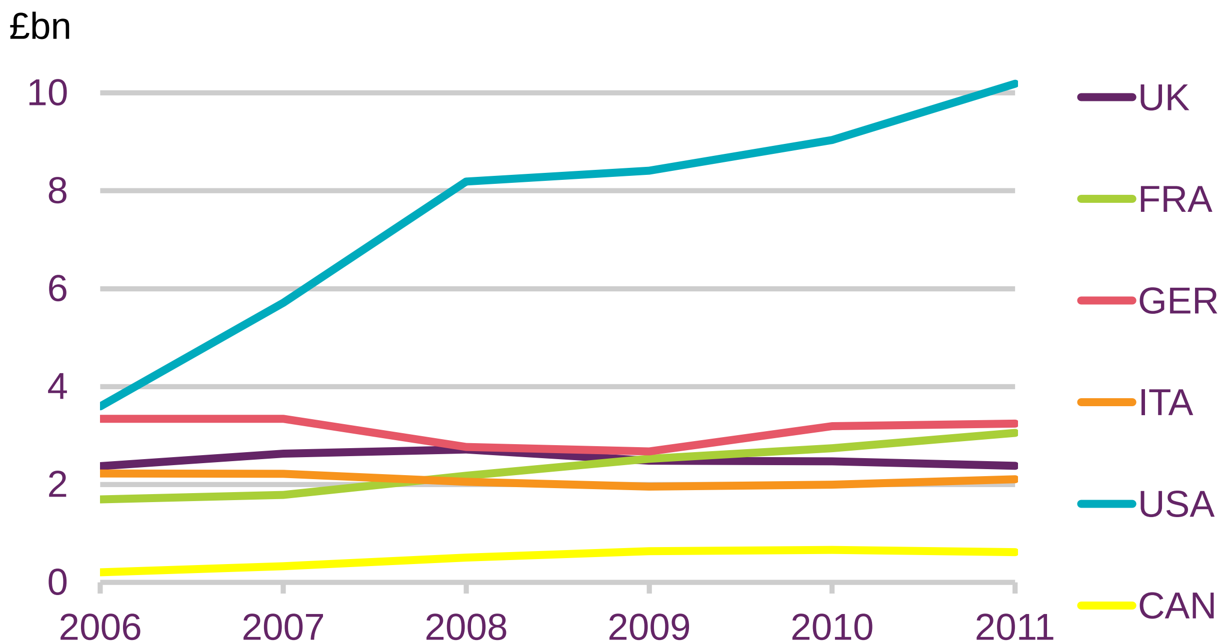
Average revenue per SMS message

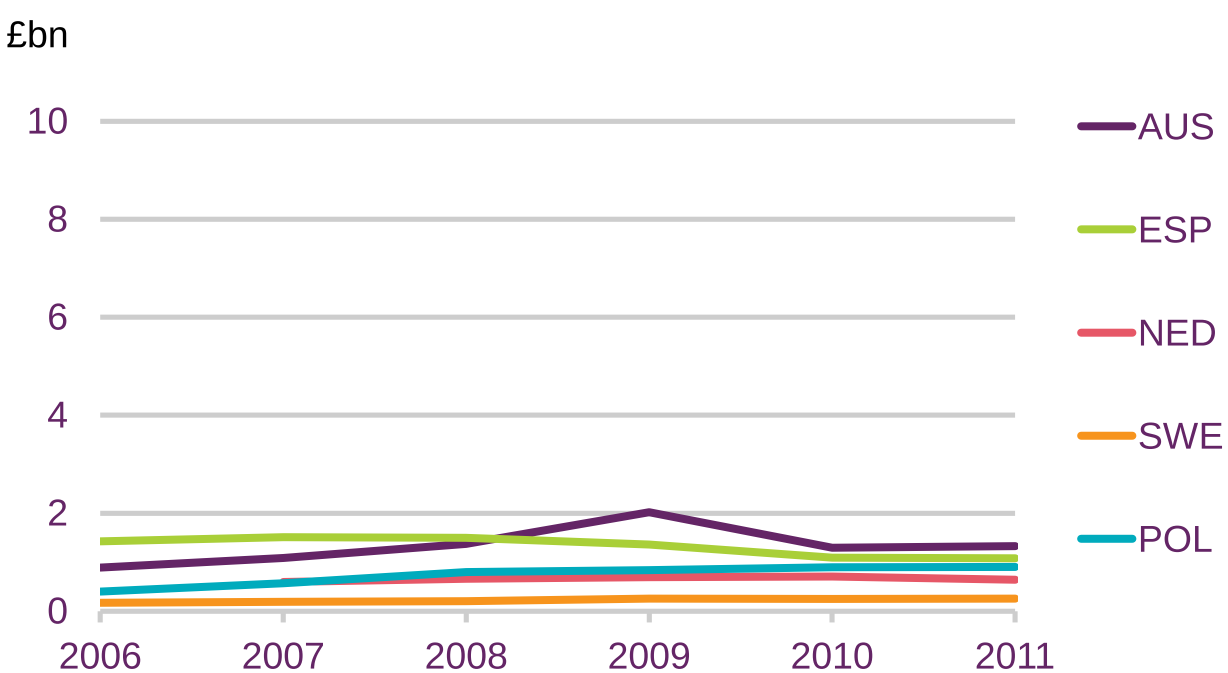
Country	Pence per message
UK	1.6
FRA	2.1
GER	5.9
ITA	2.4
USA	0.4
CAN	0.8
AUS	5.3
ESP	14.5
NED	5.9
SWE	1.4
POL	1.8

Source: IDATE / industry data / Ofcom.
Note: USA figures include push-to-text and so should not be compared with the other countries.

Figure 6.16

SMS revenues: 2006-2011

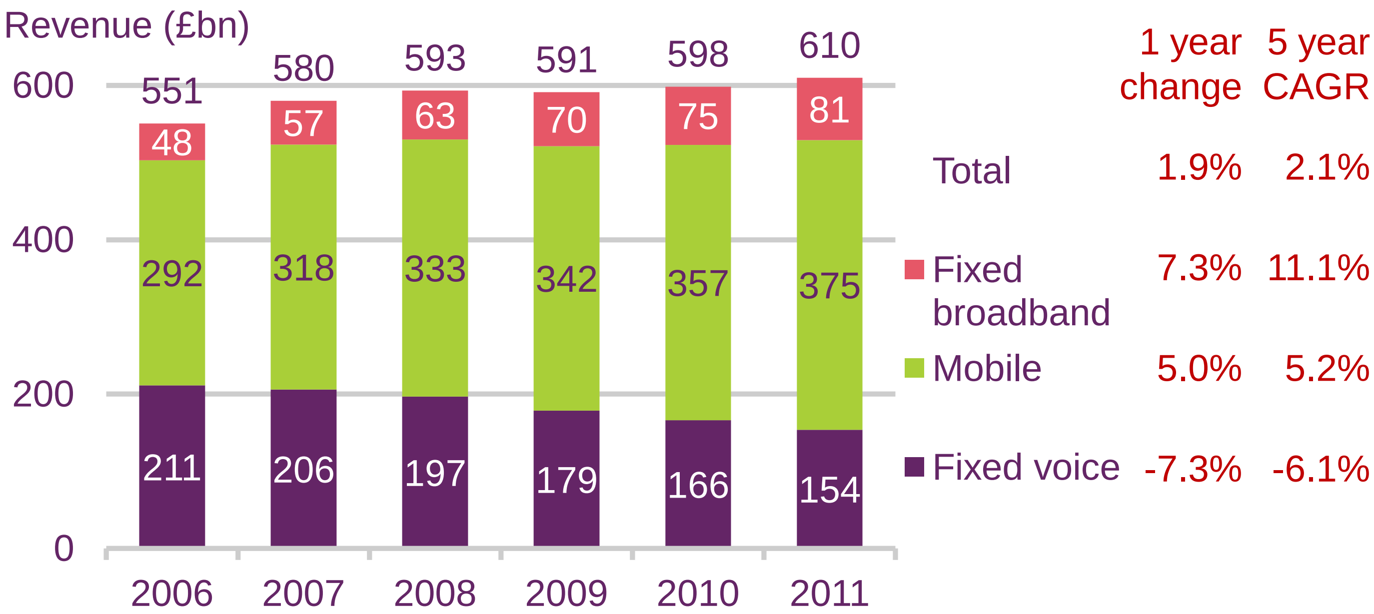




Source: IDATE / industry data / Ofcom.
Note: US figures include push-to-text and so should not be compared to other countries.

Figure 6.17

Total comparator country retail telecoms revenue, by sector: 2006 to 2011

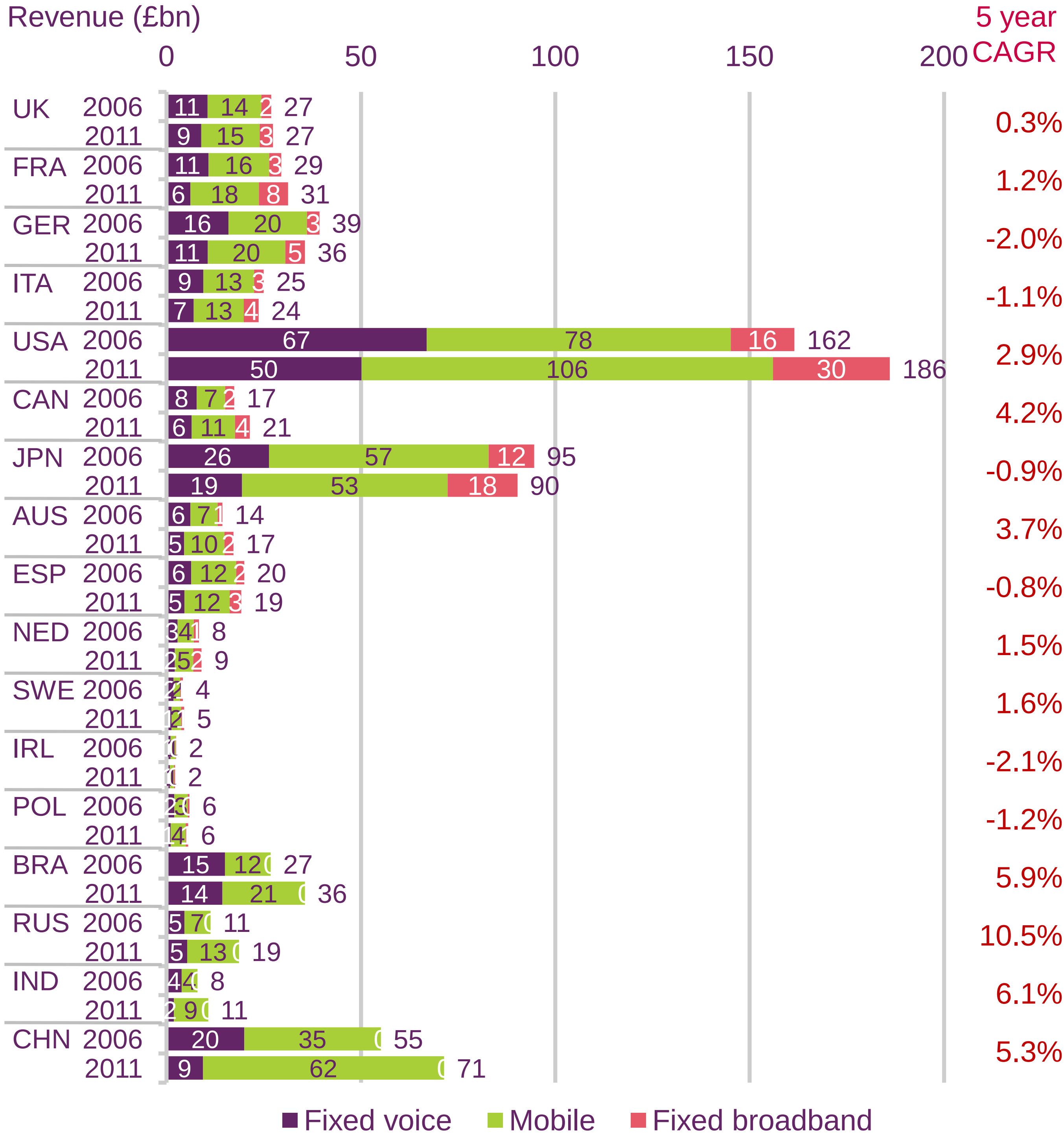


Source: IDATE / industry data / Ofcom

Note: Excludes revenue from narrowband internet and corporate data services and broadband revenues for BRA, RUS, IND and CHN; covers only the 17 countries in the analysis.

Figure 6.18

Telecoms service retail revenues by sector: 2006 and 2011

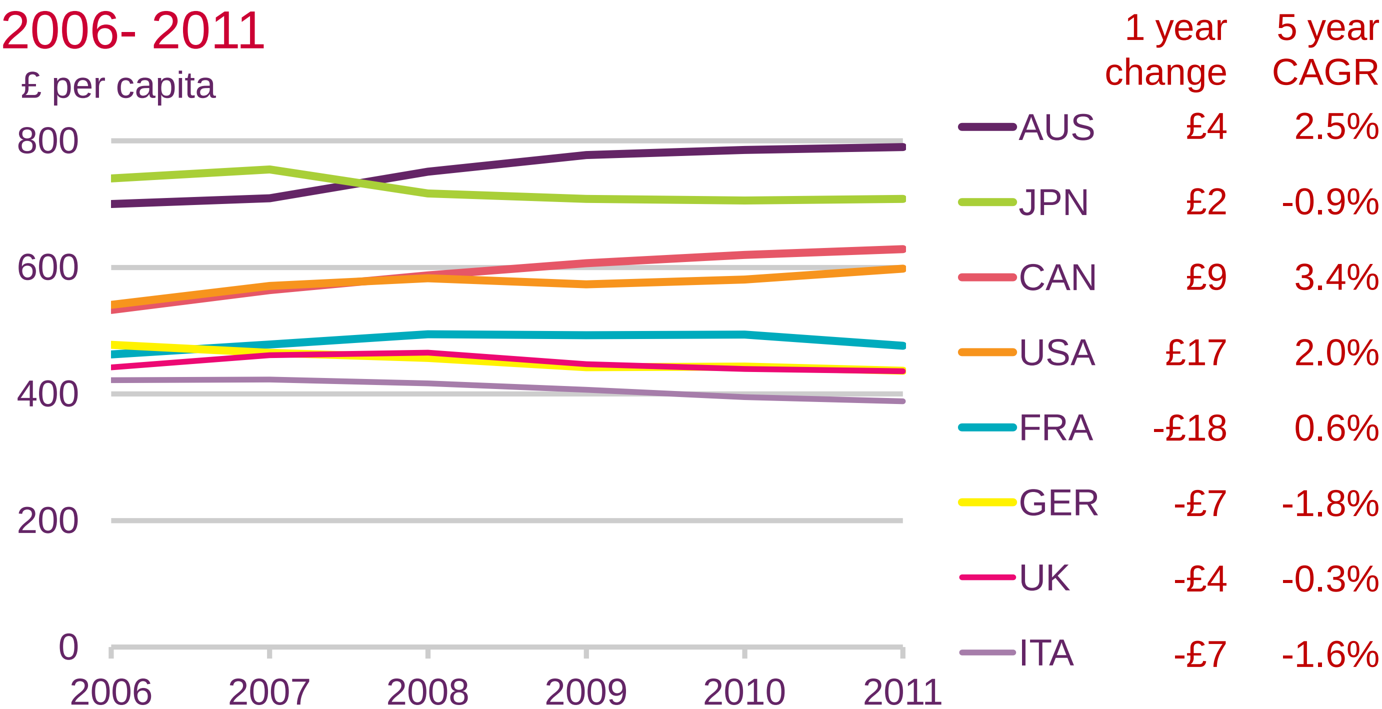


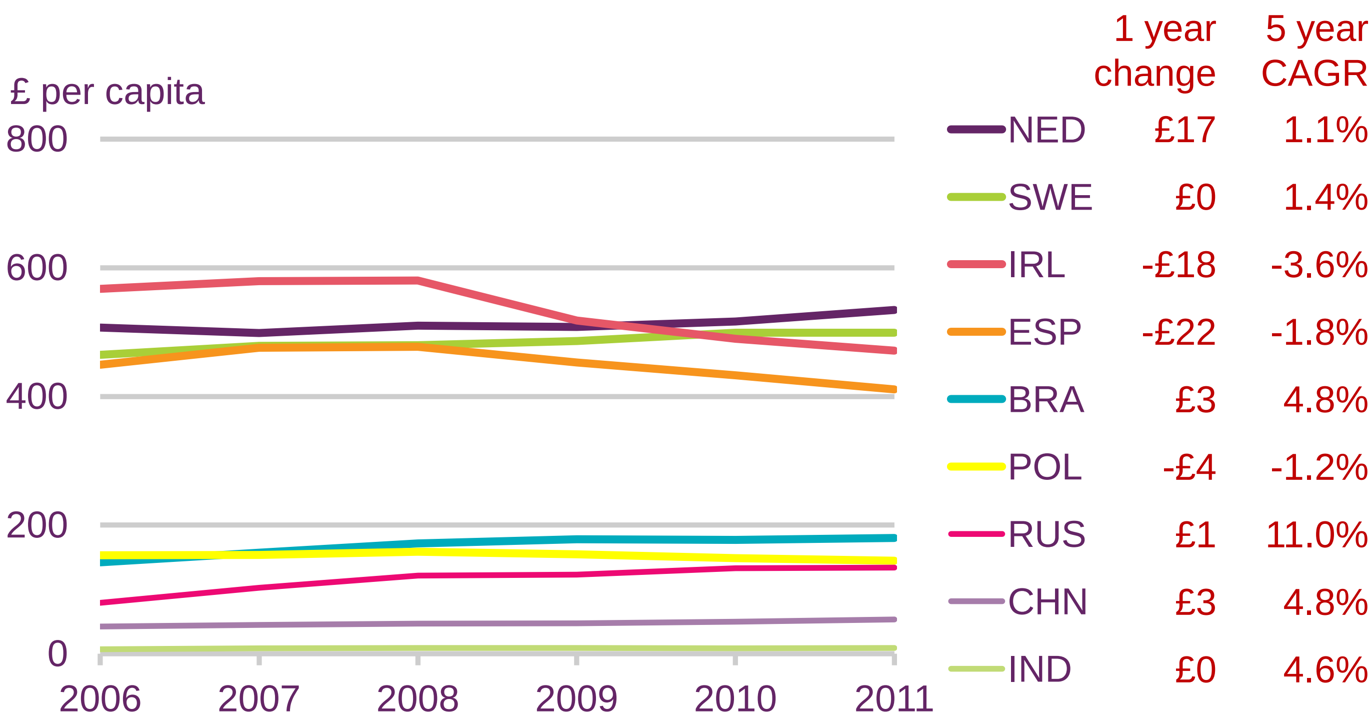
Source: IDATE / industry data / Ofcom

Note: Total service revenue excludes revenue from narrowband internet and corporate data services and broadband revenues for BRA, RUS, IND and CHN

Figure 6.19

Total telecoms service revenue, per capita: 2006- 2011

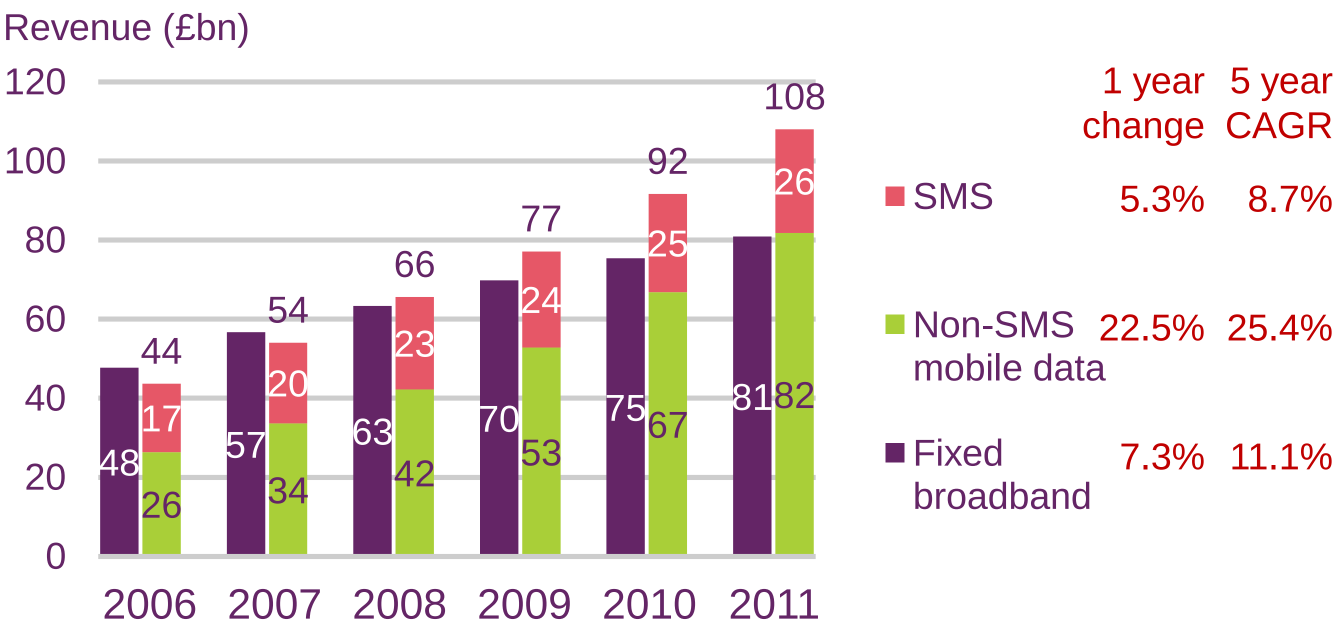




Source: IDATE / industry data / Ofcom

Figure 6.20

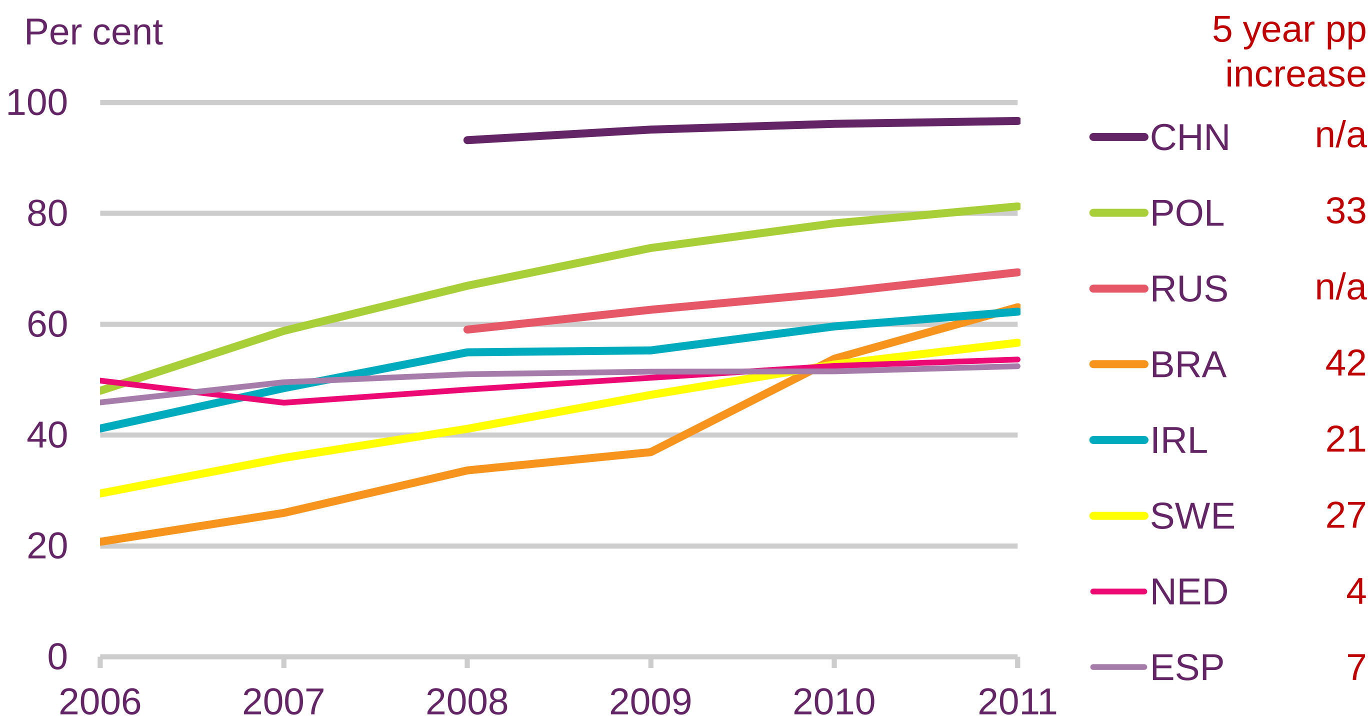
Fixed broadband and mobile data revenues – total for the comparator countries: 2006 to 2011



Source: IDATE / industry data / Ofcom
Note: Analysis excludes Brazil, Russia, India and China.

Figure 6.21

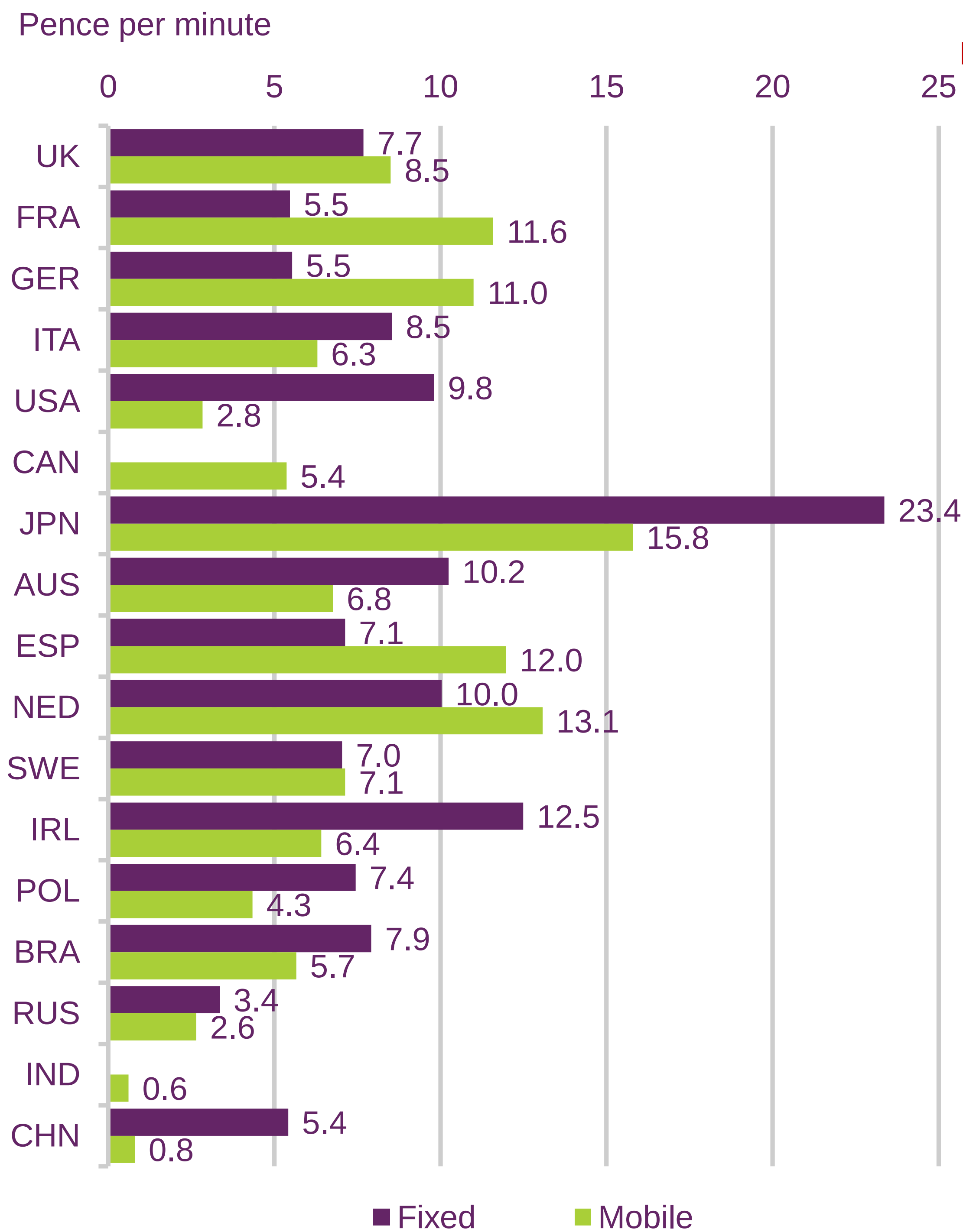
Percentage of voice minutes originating from a mobile: 2006 to 2011



Source: IDATE / industry data / Ofcom. Note: USA, Canada and China – incoming calls to mobile included within mobile figures.

Figure 6.22

Average cost of a fixed and mobile call minute: 2011

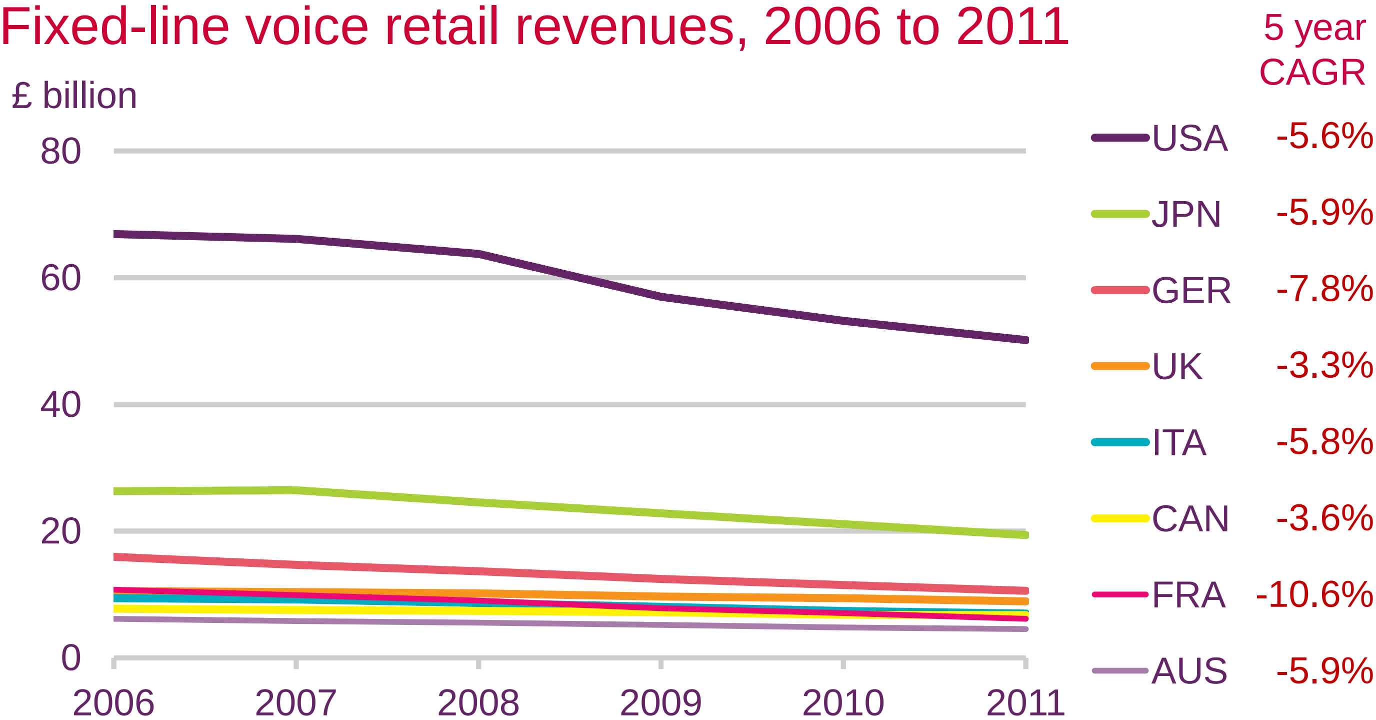


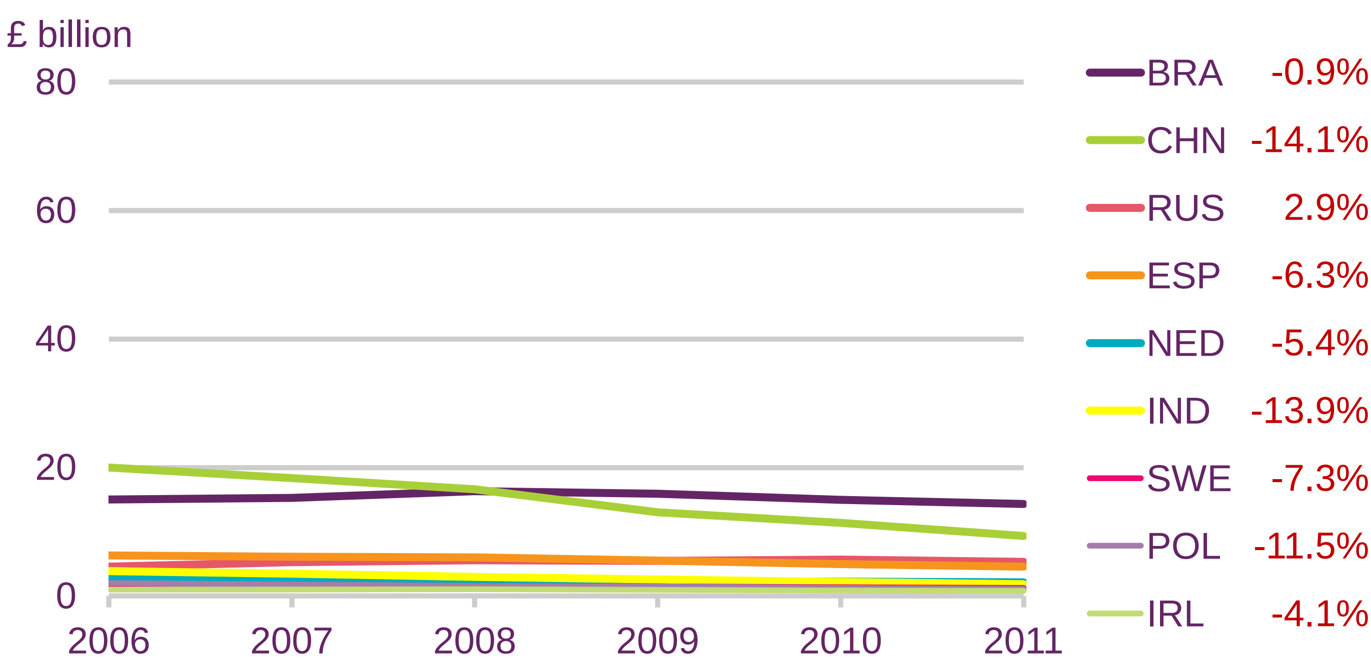
	Mobile premium 2006	Mobile premium 2011
UK	80%	11%
FRA	36%	112%
GER	254%	99%
ITA	42%	-26%
USA	-47%	-71%
CAN	-36%	n/a
JPN	58%	-32%
AUS	82%	-34%
ESP	80%	68%
NED	26%	30%
SWE	87%	1%
IRL	33%	-49%
POL	60%	-42%
BRA	179%	-29%
RUS	n/a	-21%
IND	n/a	n/a
CHN	n/a	-85%

Source: IDATE/Ofcom/operators. Note: Fixed voice figures for CAN and USA exclude local calls; fixed averages include NTS calls which were excluded from the 8.3 pence per minute fixed voice call average published in the 2012 UK Communications Market Report; mobile calculation for CAN, US and CHN includes incoming call minutes.

Figure 6.23

Fixed-line voice retail revenues, 2006 to 2011

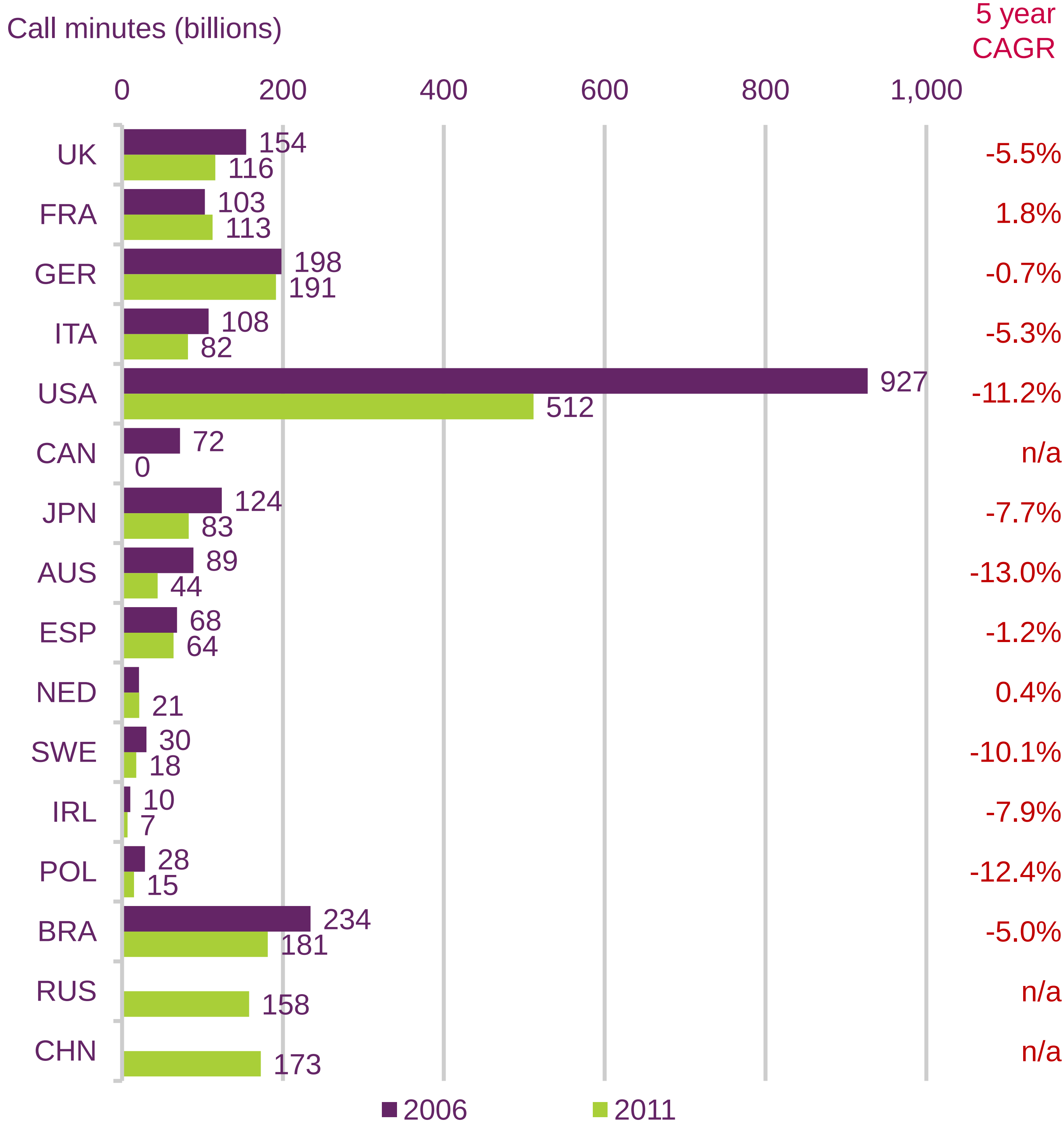




Source: IDATE / industry data / Ofcom

Figure 6.24

Fixed-line voice call volumes, 2006 and 2011

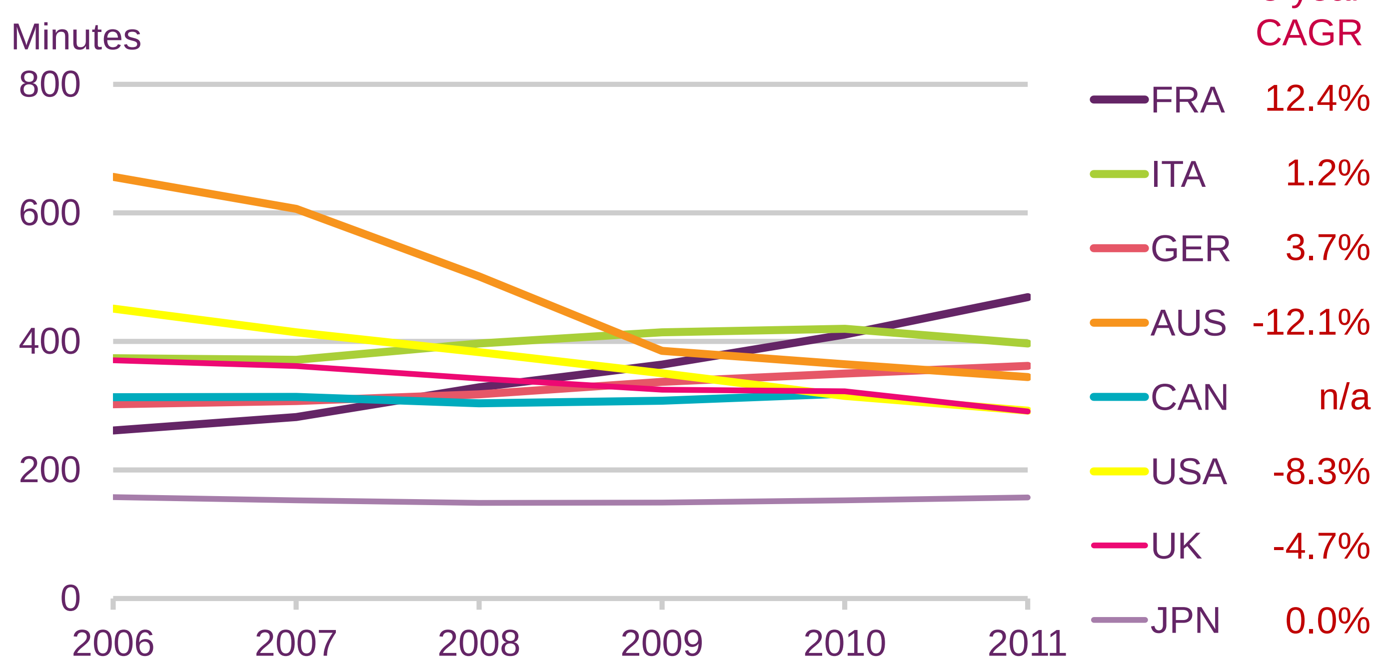


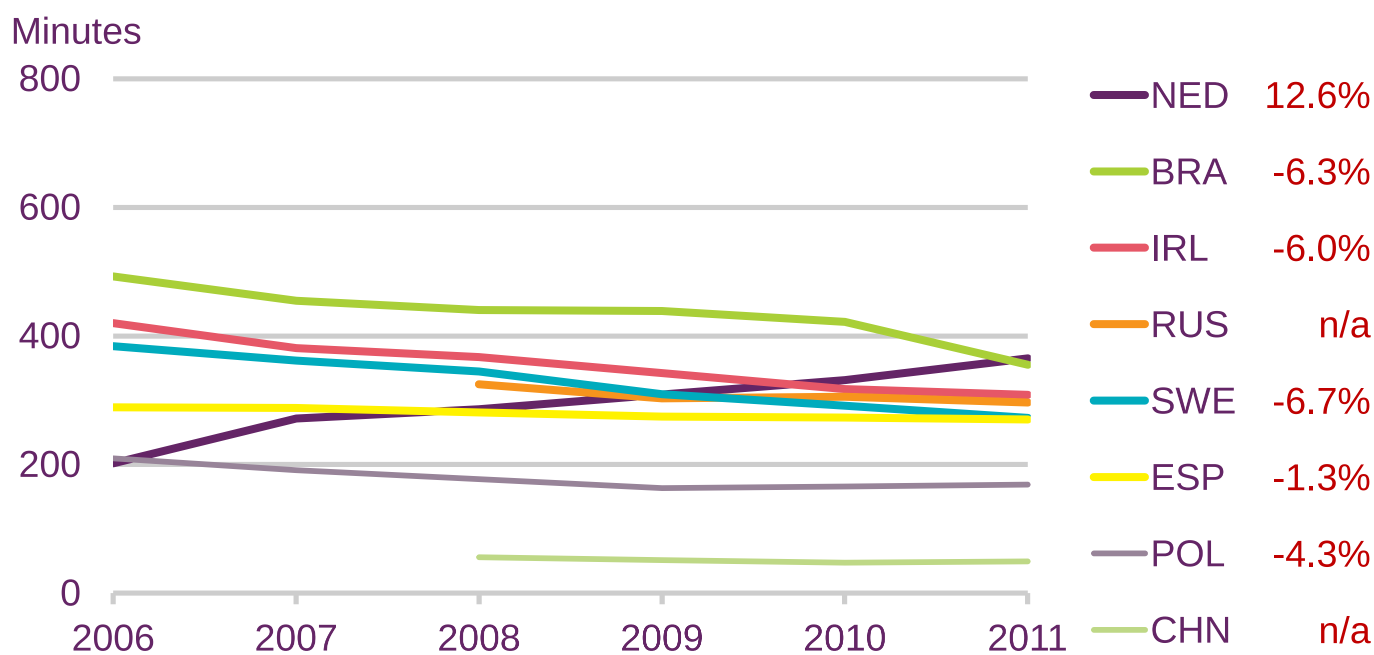
Source: IDATE / industry data / Ofcom

Note: Figures for USA and CAN exclude local and VoIP calls and include incoming mobile calls

Figure 6.25

Monthly outbound minutes per fixed line, 2006 to 2011



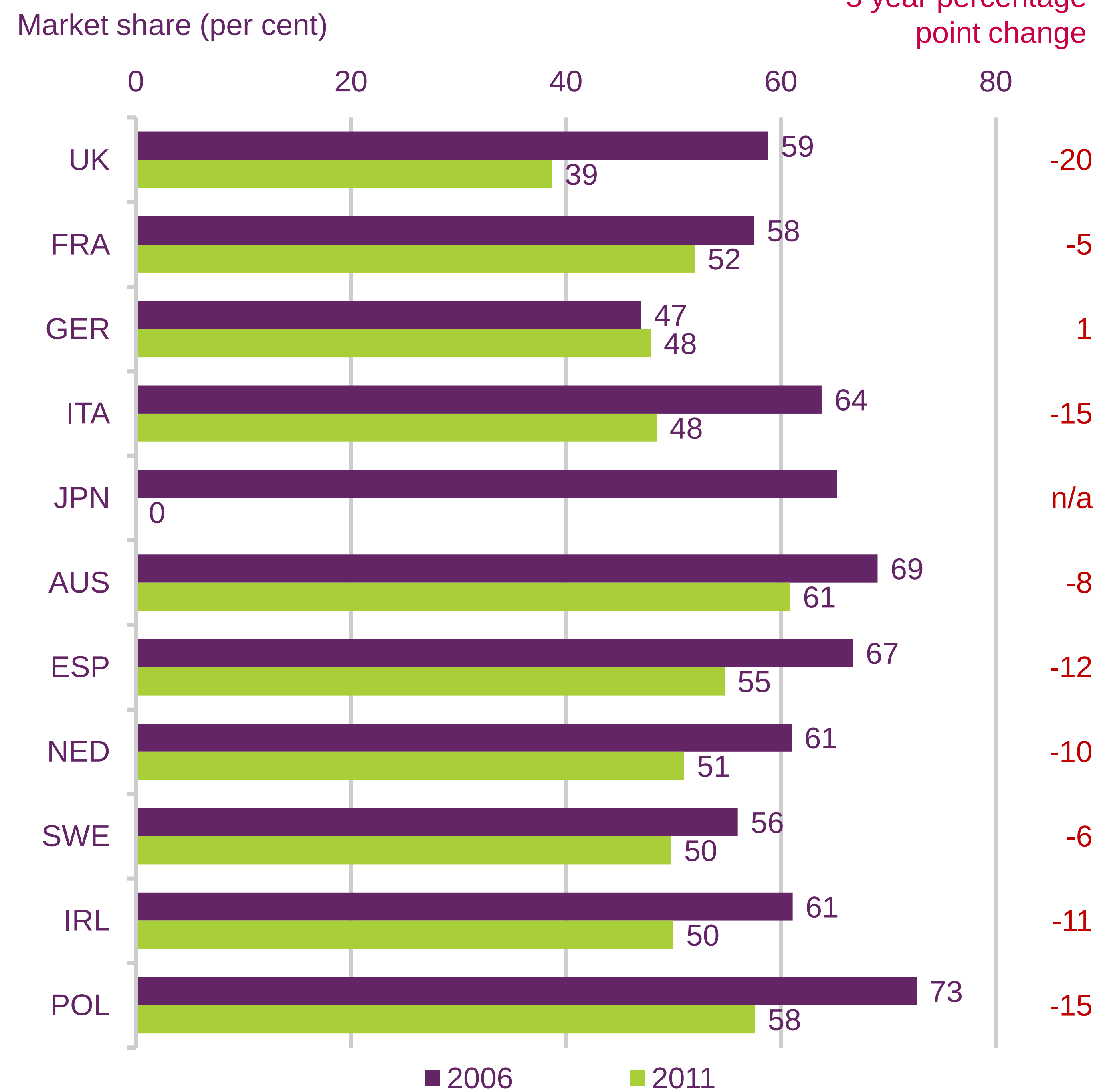


Source: IDATE / industry data / Ofcom

Note: Figures for USA and CAN exclude local and VoIP calls and include incoming mobile calls

Figure 6.26

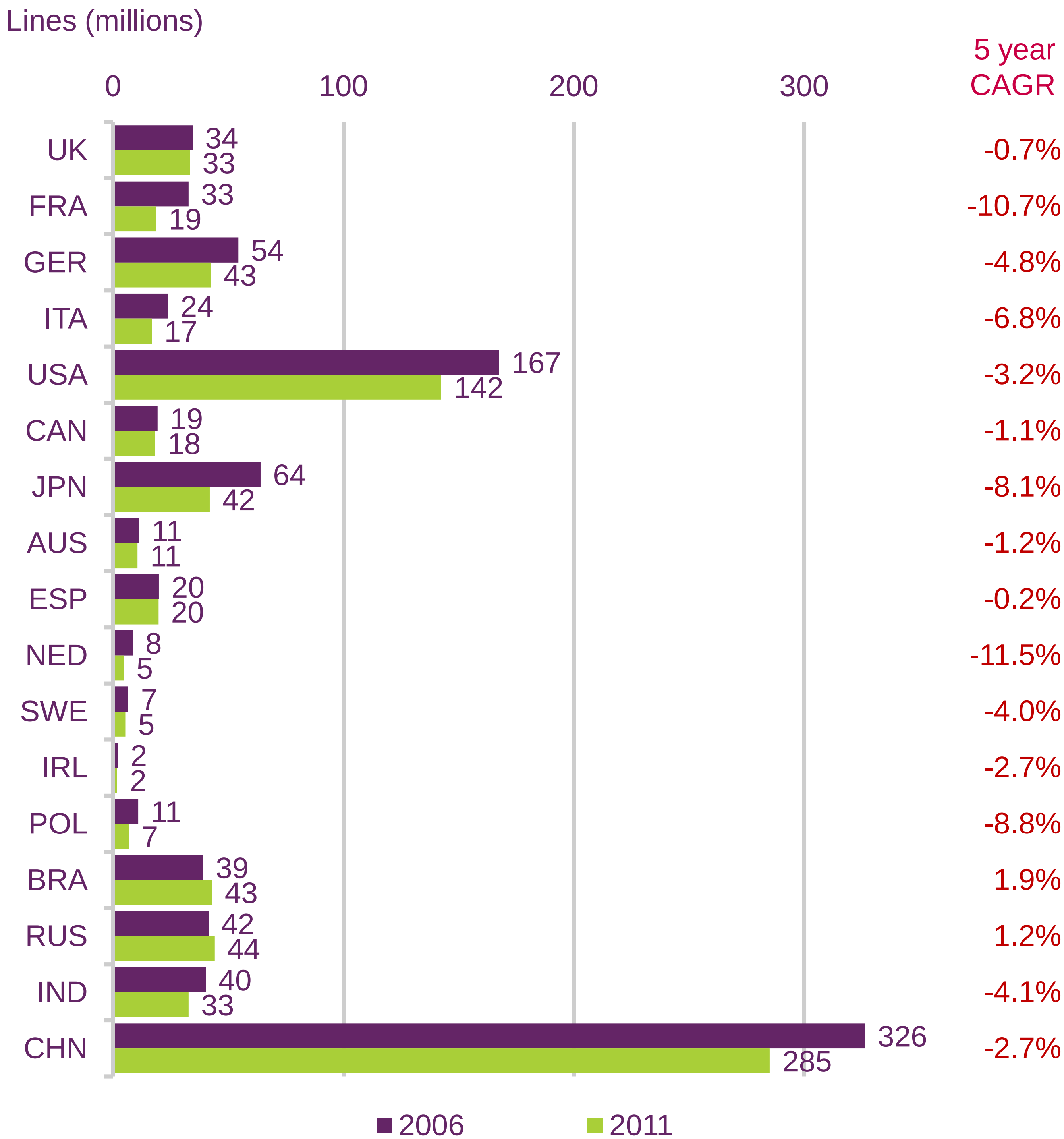
Incumbent operator's share of fixed voice call volumes, 2006 and 2011



Source: IDATE / industry data / Ofcom

Figure 6.27

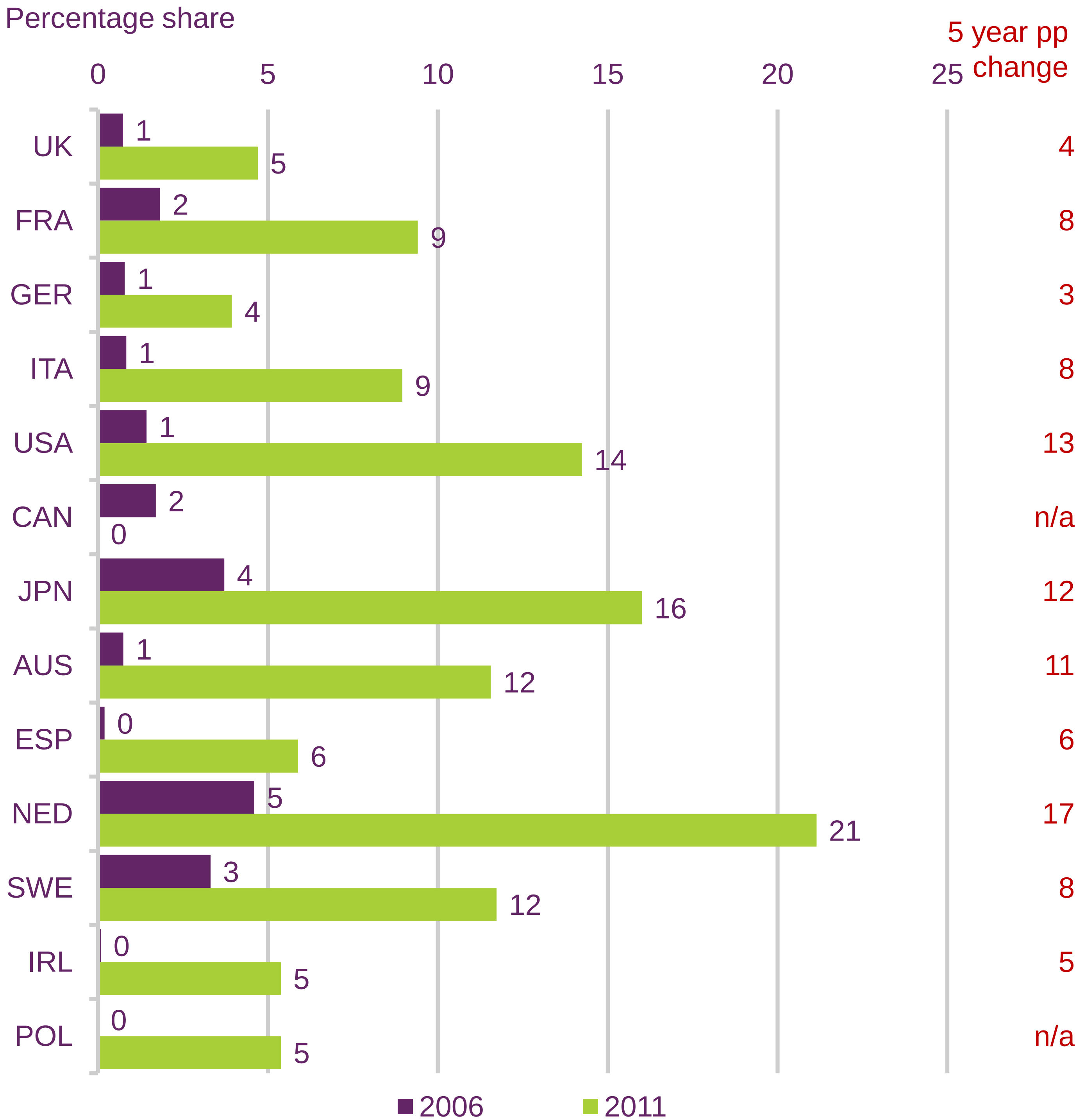
Fixed exchange lines, 2006 and 2011



Source: IDATE / industry data / Ofcom

Figure 6.28

VoIP as a proportion of total fixed line revenues, 2006 and 2011



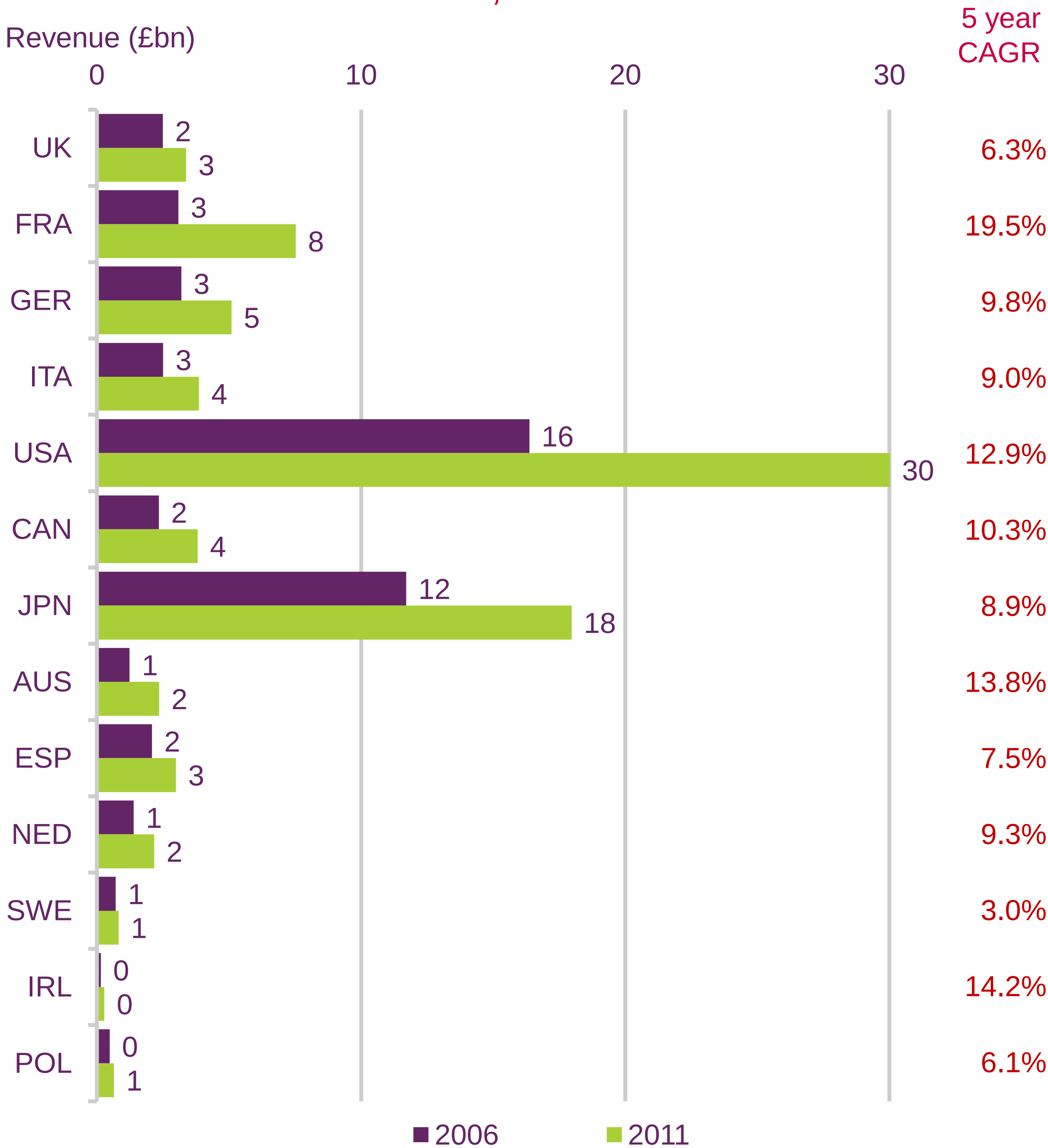
Source: IDATE

The telecoms industry

Fixed broadband services

Figure 6.29

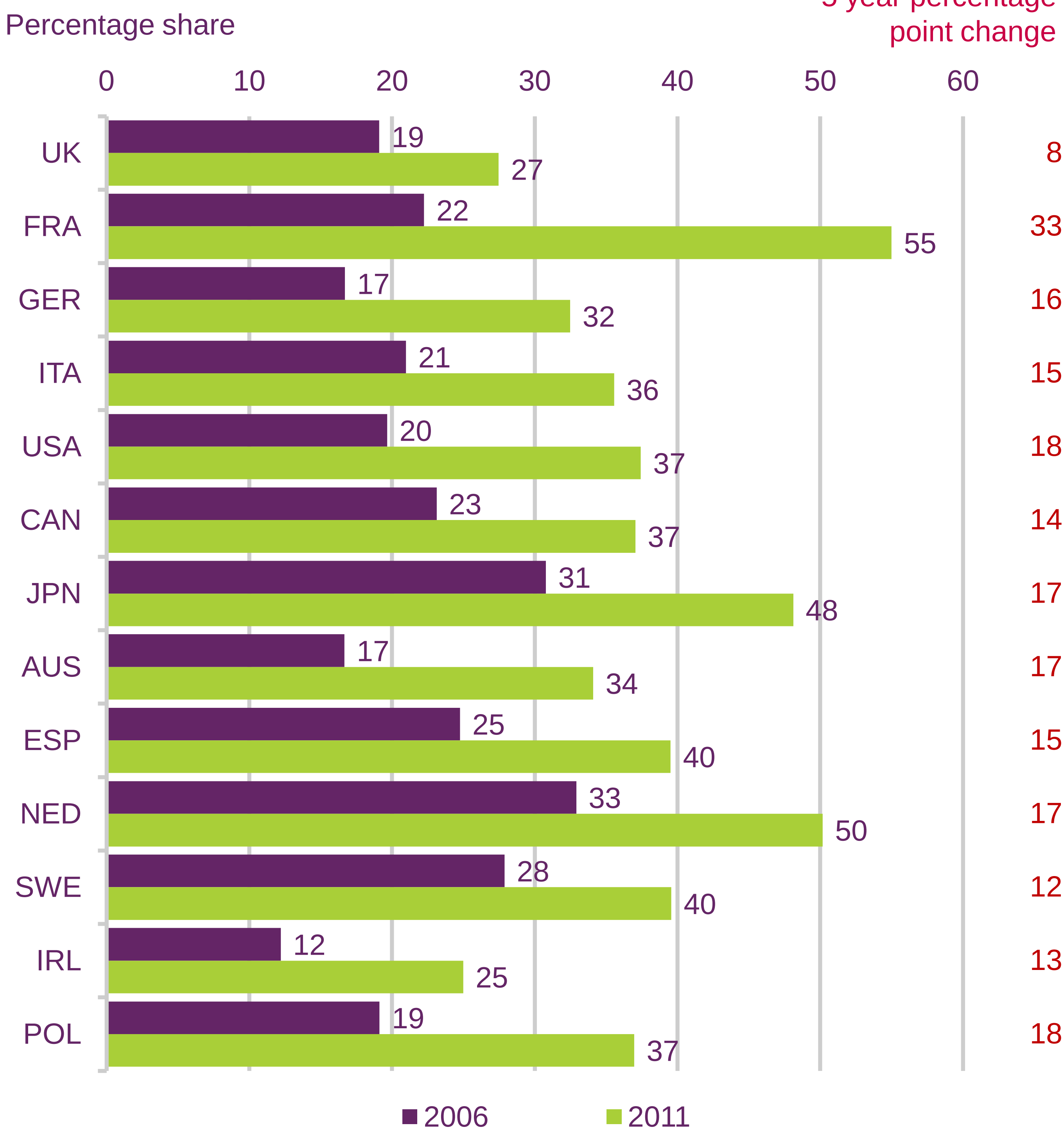
Fixed broadband revenues, 2006 and 2011



Source: IDATE / industry data / Ofcom

Figure 6.30

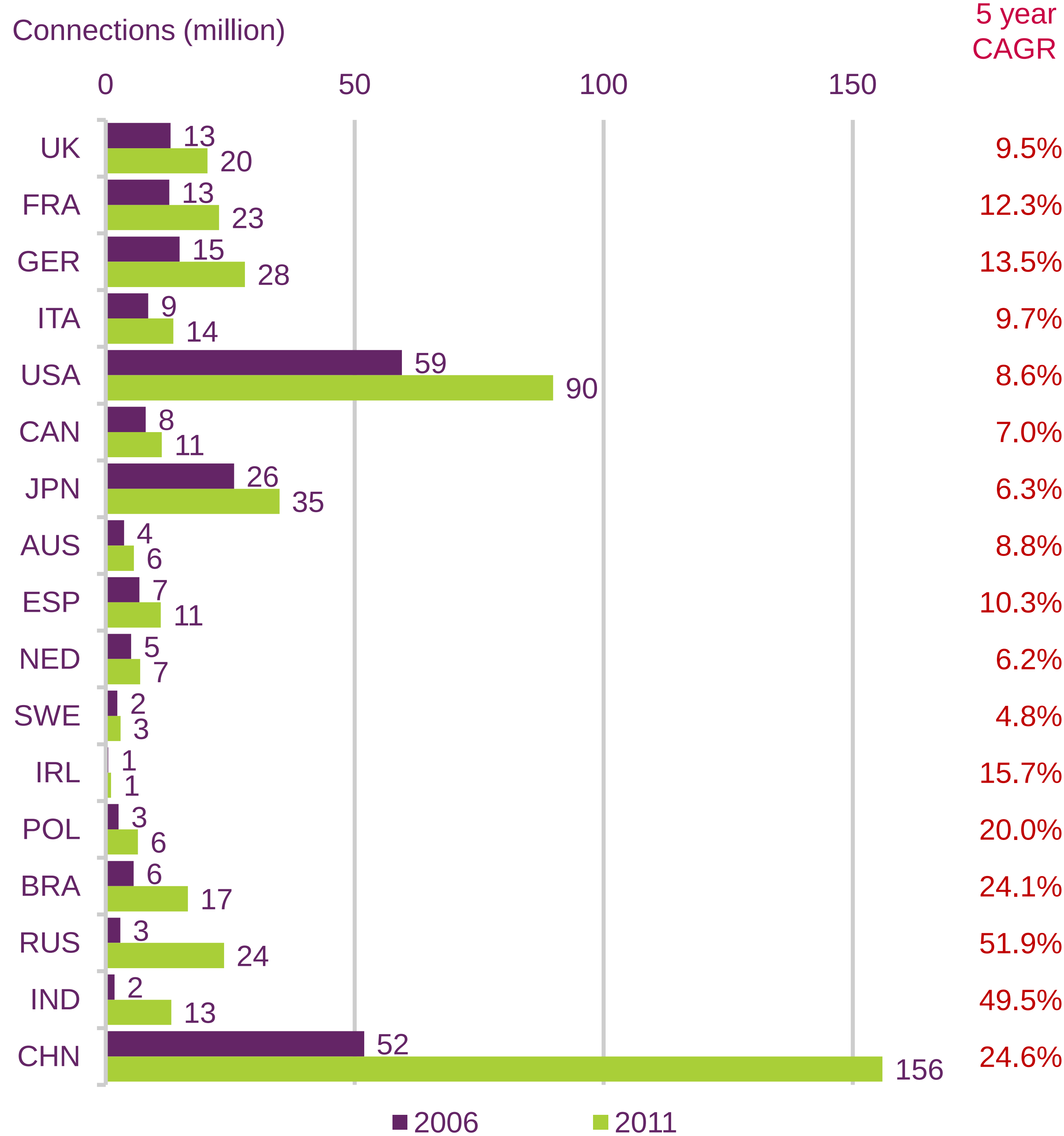
Fixed broadband as a proportion of total fixed revenues, 2006 and 2011



Source: IDATE / industry data / Ofcom

Figure 6.31

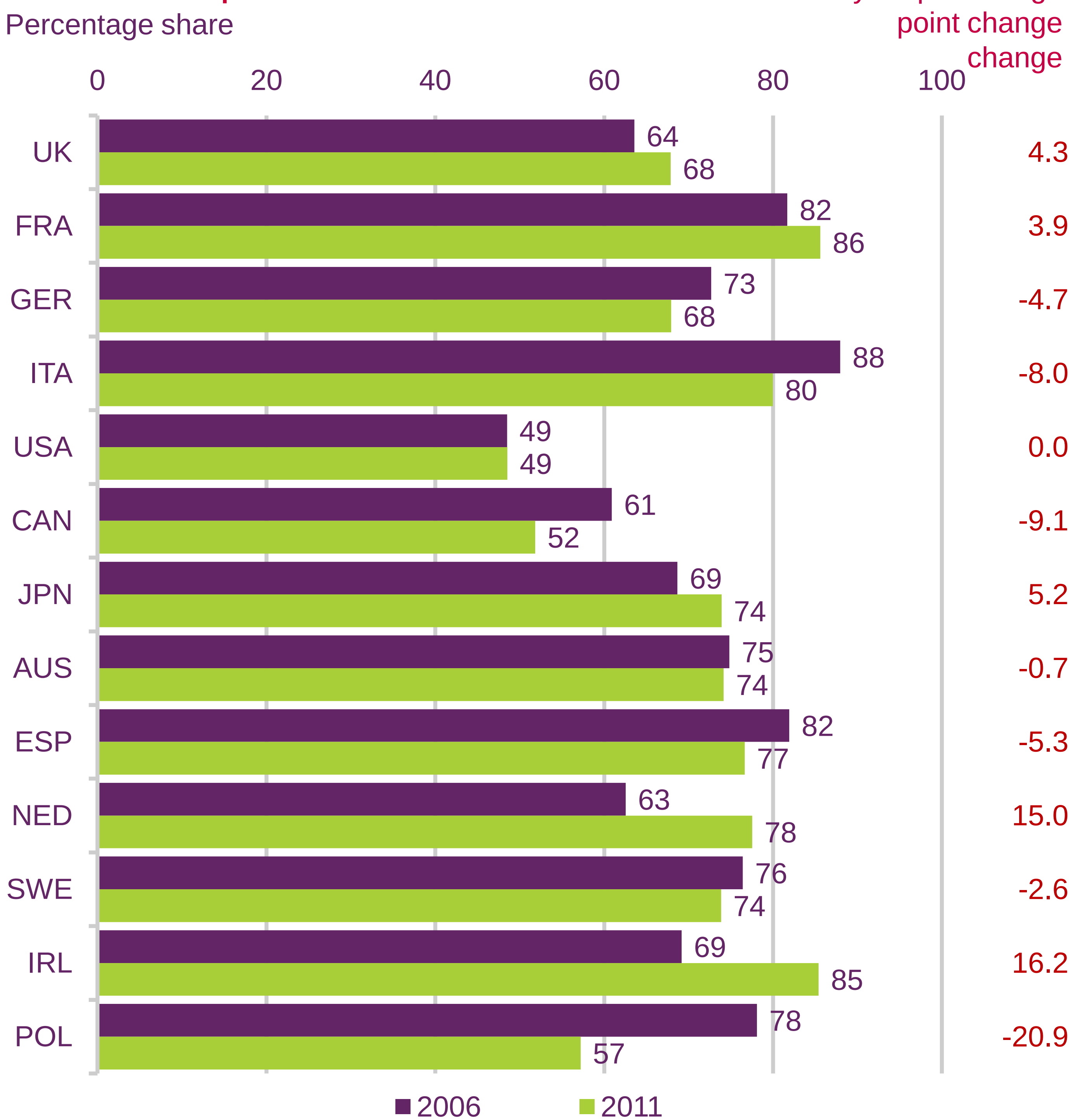
Fixed broadband connections, 2006 and 2011



Source: IDATE / industry data / Ofcom

Figure 6.32

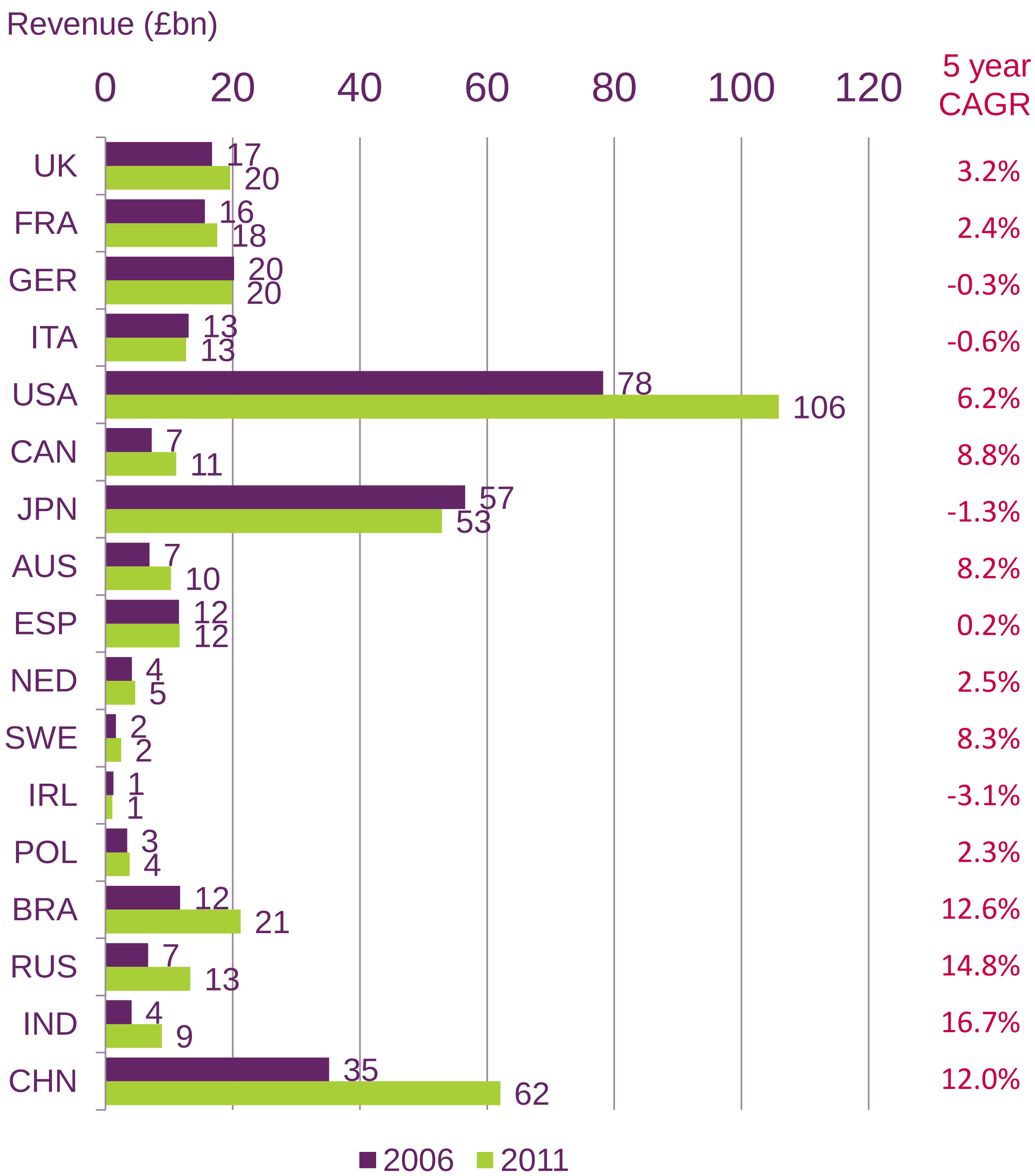
Retail connection share of the three largest fixed broadband providers, 2006 and 2011



Source: IDATE / industry data / Ofcom

Figure 6.33

Mobile retail revenues, 2006 and 2011

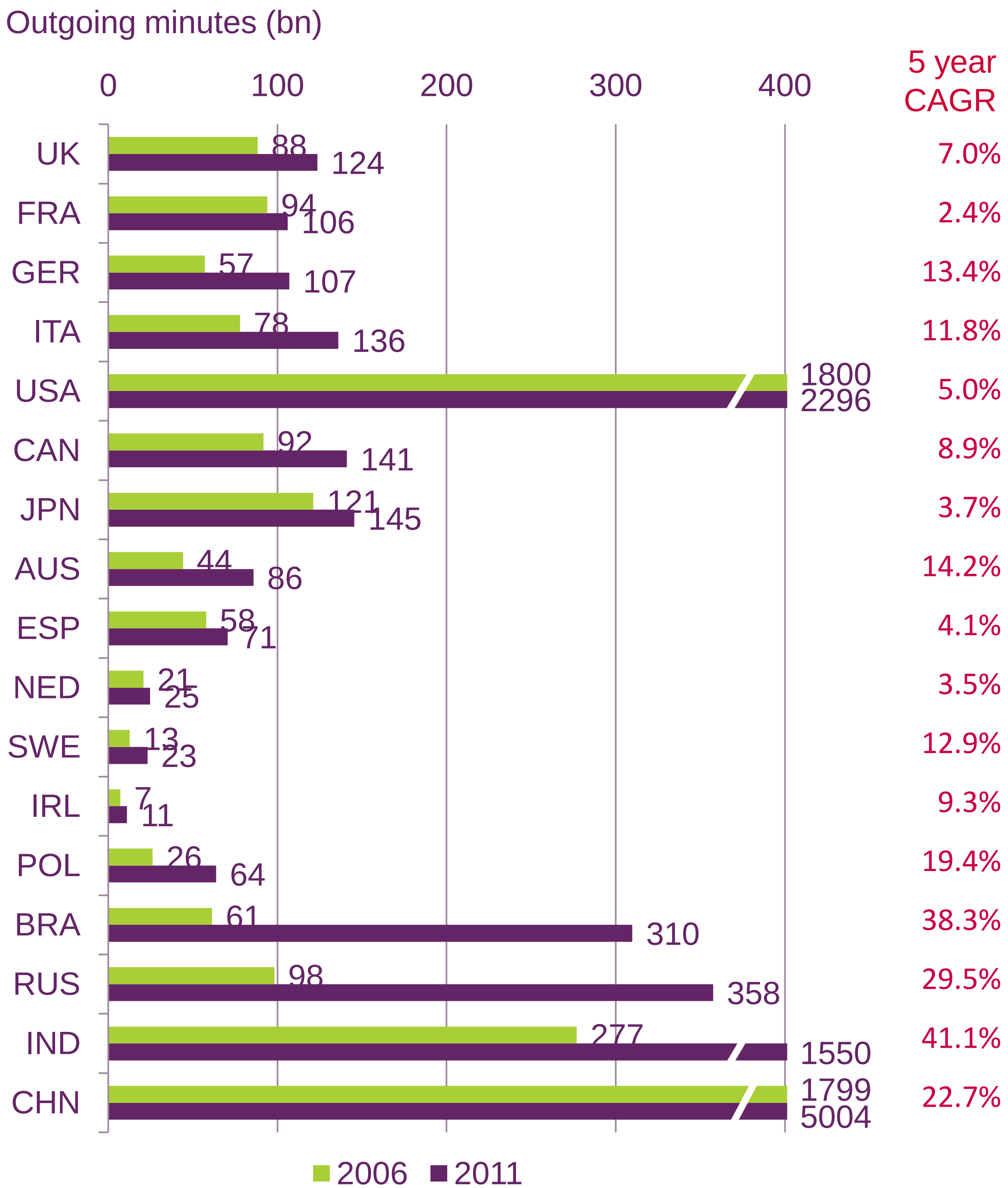


Sources: IDATE / industry data / Ofcom

Note: USA, CAN and CHN data includes revenues from incoming calls

Figure 6.34

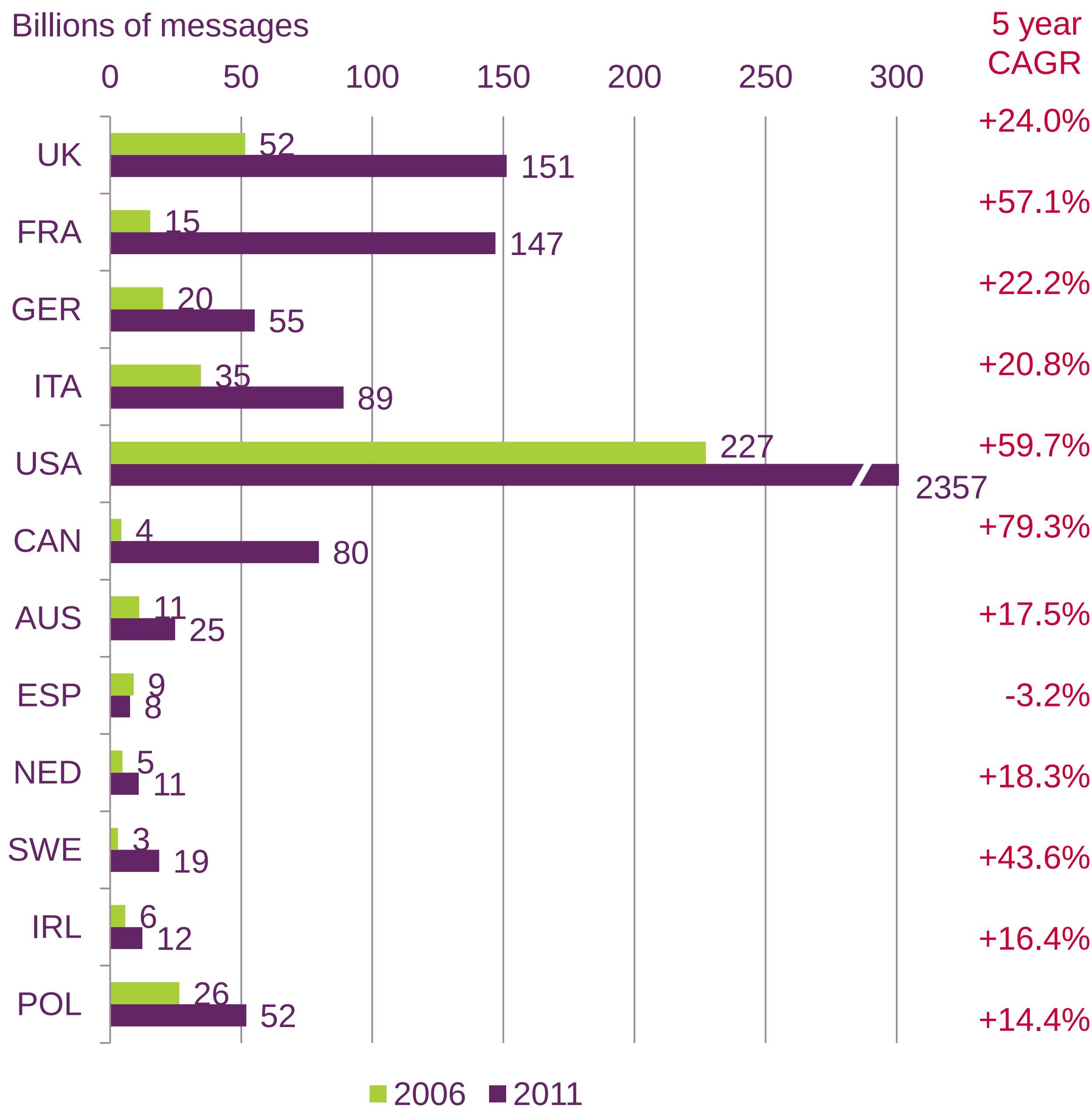
Mobile voice call volumes: 2006 and 2011



Source: IDATE / industry data / Ofcom
Note: USA, CAN and CHN include incoming calls

Figure 6.35

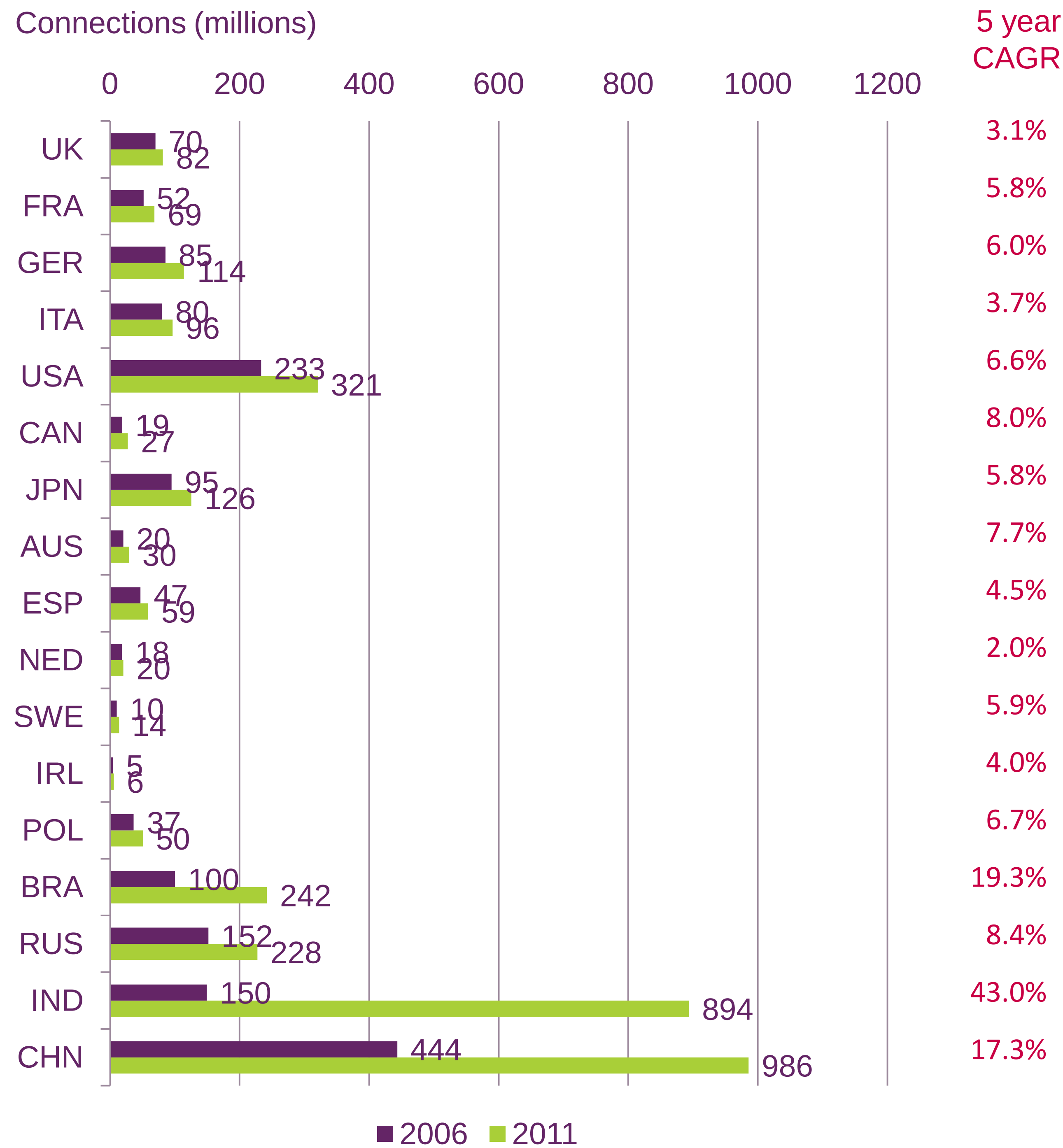
Mobile messaging volumes: 2006 and 2011



Source: IDATE / industry data / Ofcom
Note: Includes SMS and MMS messages. MMS messaging volume figures unavailable for Italy, Australia and the Netherlands. Figures for the USA include push-to-text and are not directly comparable to those for the other comparator countries

Figure 6.36

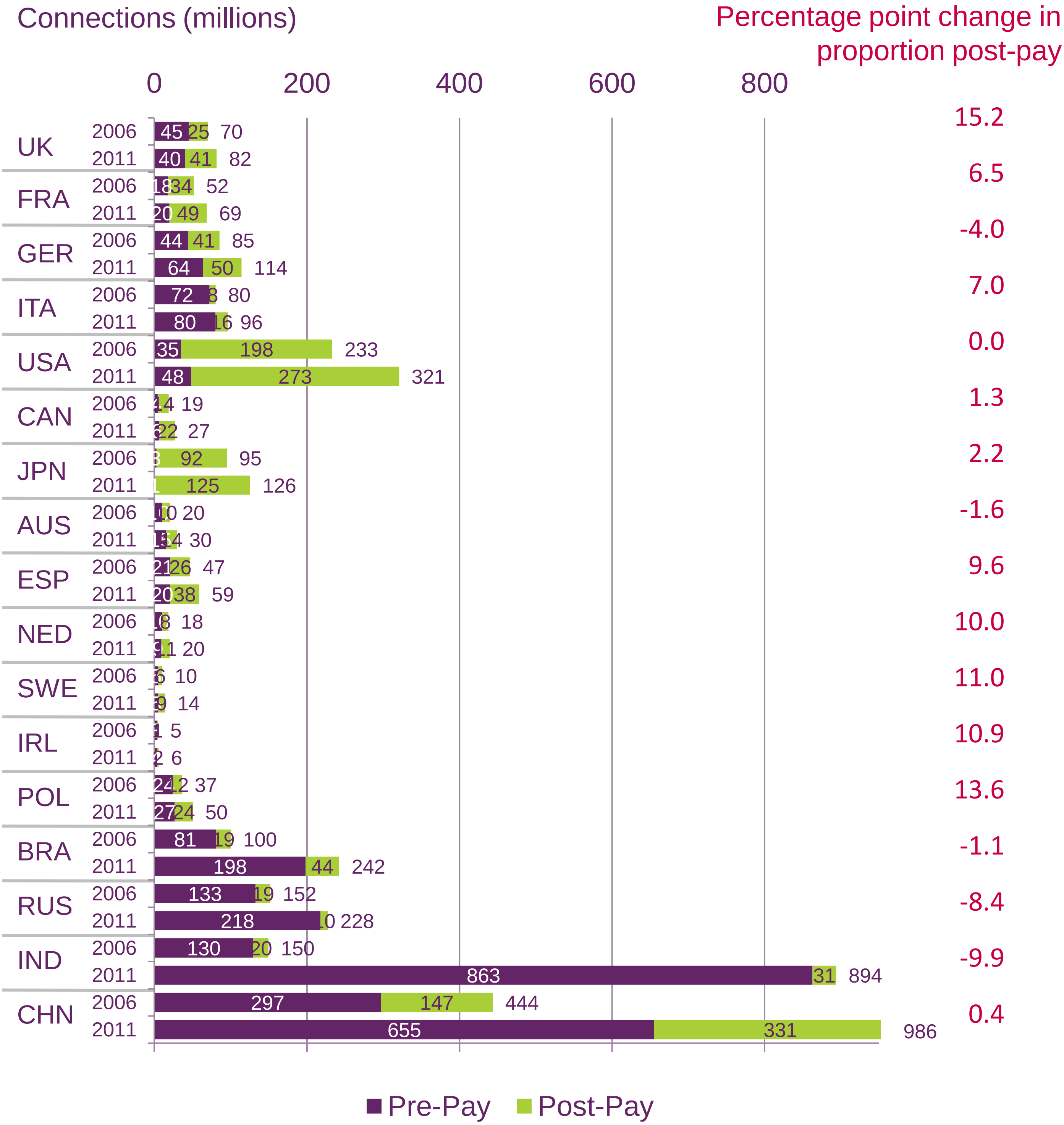
Mobile connections: 2006 and 2011



Source: IDATE / industry data / Ofcom

Fig. 6.37

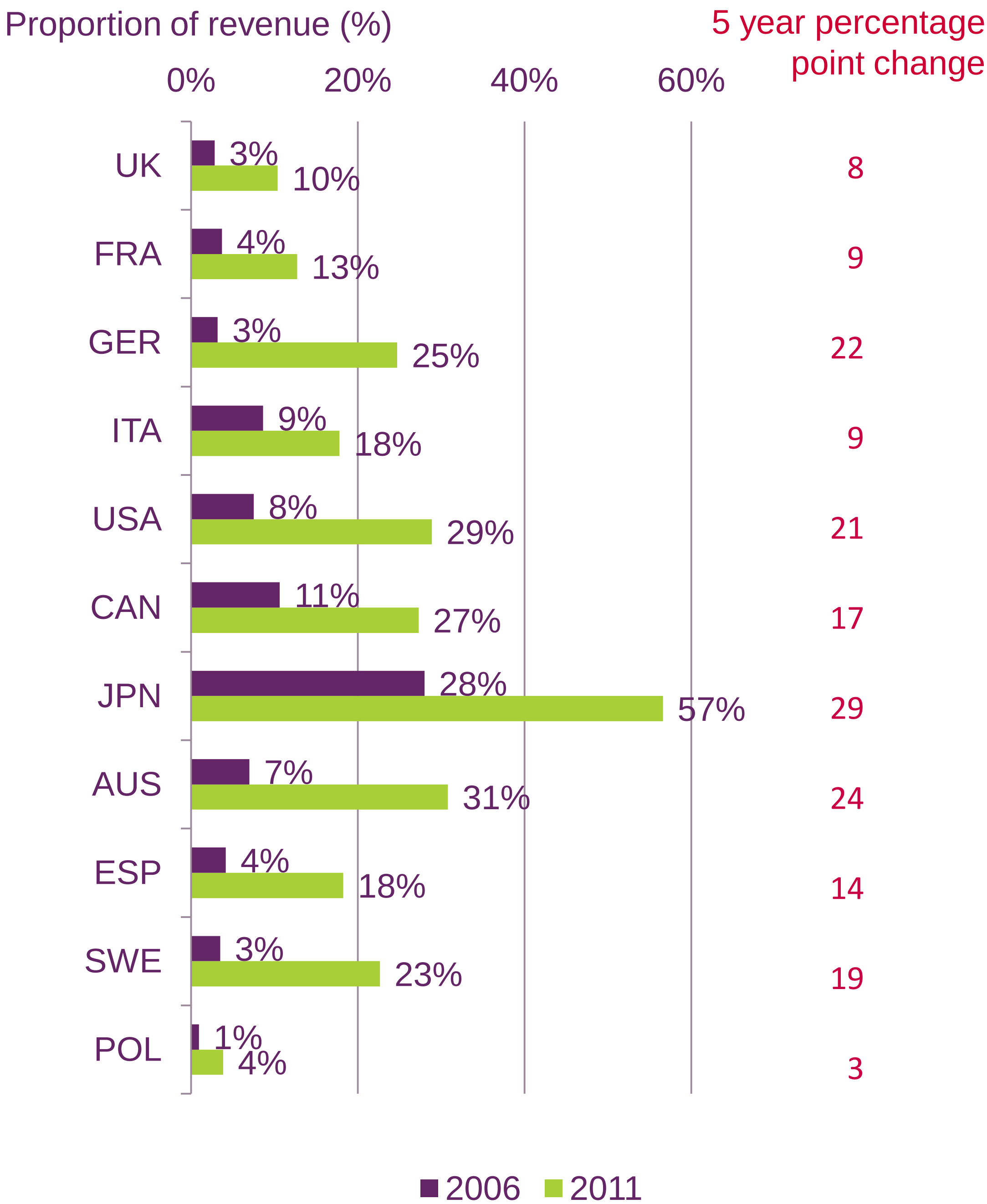
Mobile connections, by type: 2006 and 2011



Source: IDATE / industry data / Ofcom

Figure 6.38

Data as a proportion of total mobile service revenues: 2006 and 2011

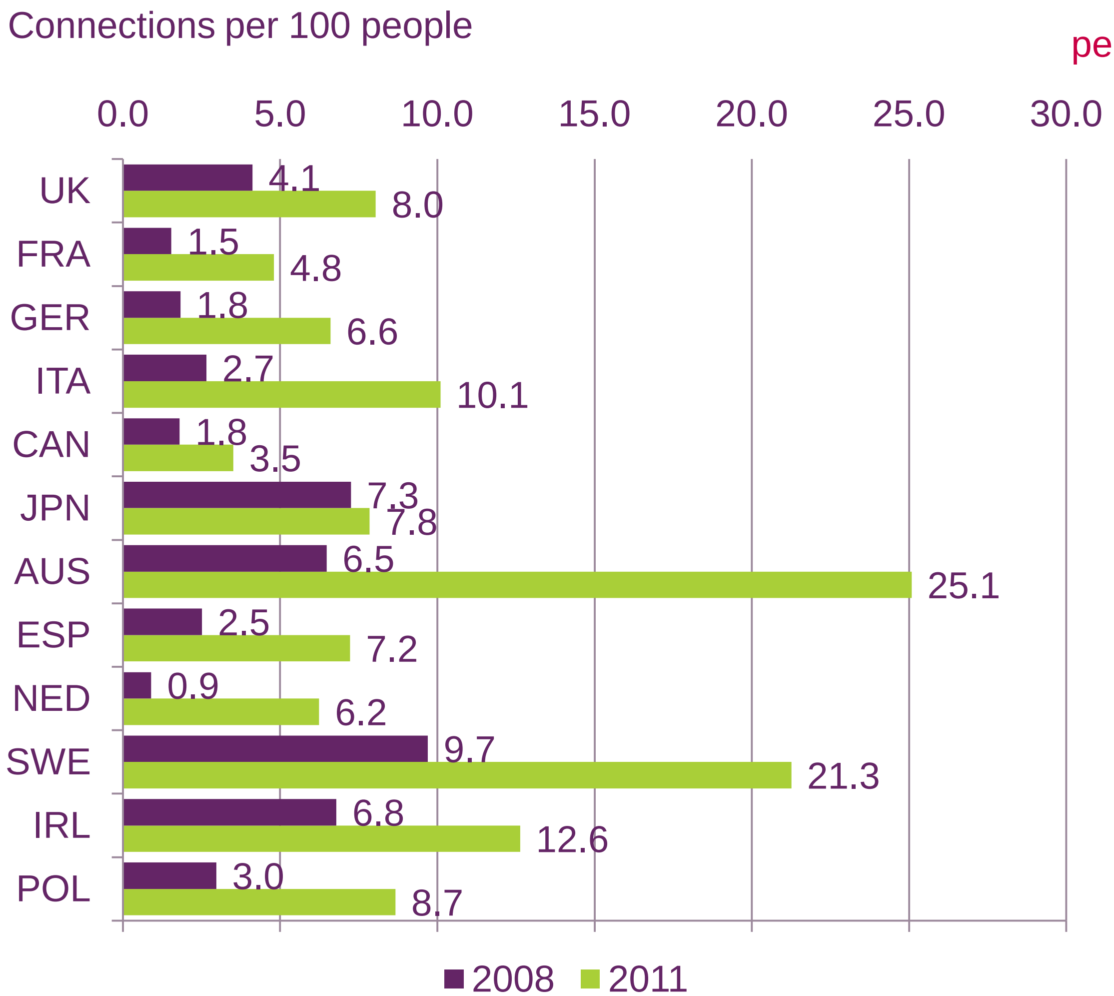


Source: IDATE / industry data / Ofcom

Note: Excludes SMS revenues. CHN. USA and CAN data for total mobile service revenues includes revenues from incoming calls

Figure 6.39

Mobile broadband penetration: 2008 and 2011

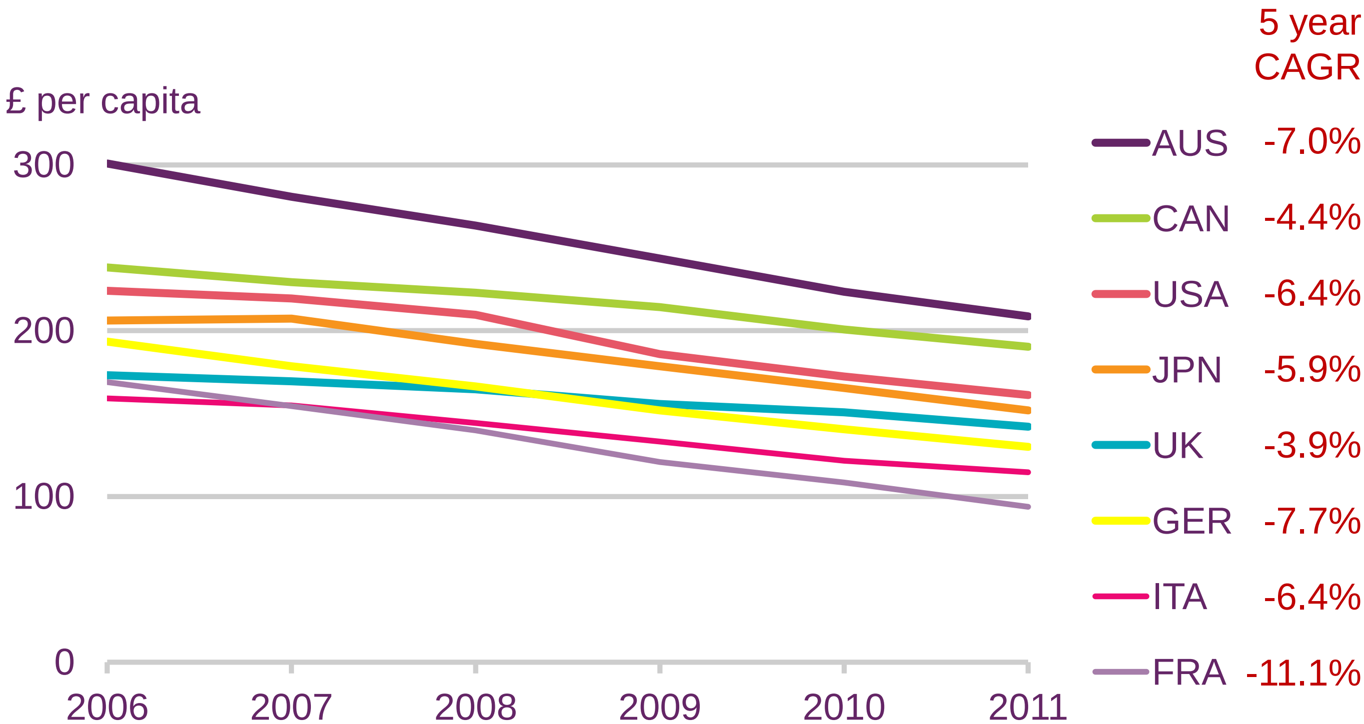


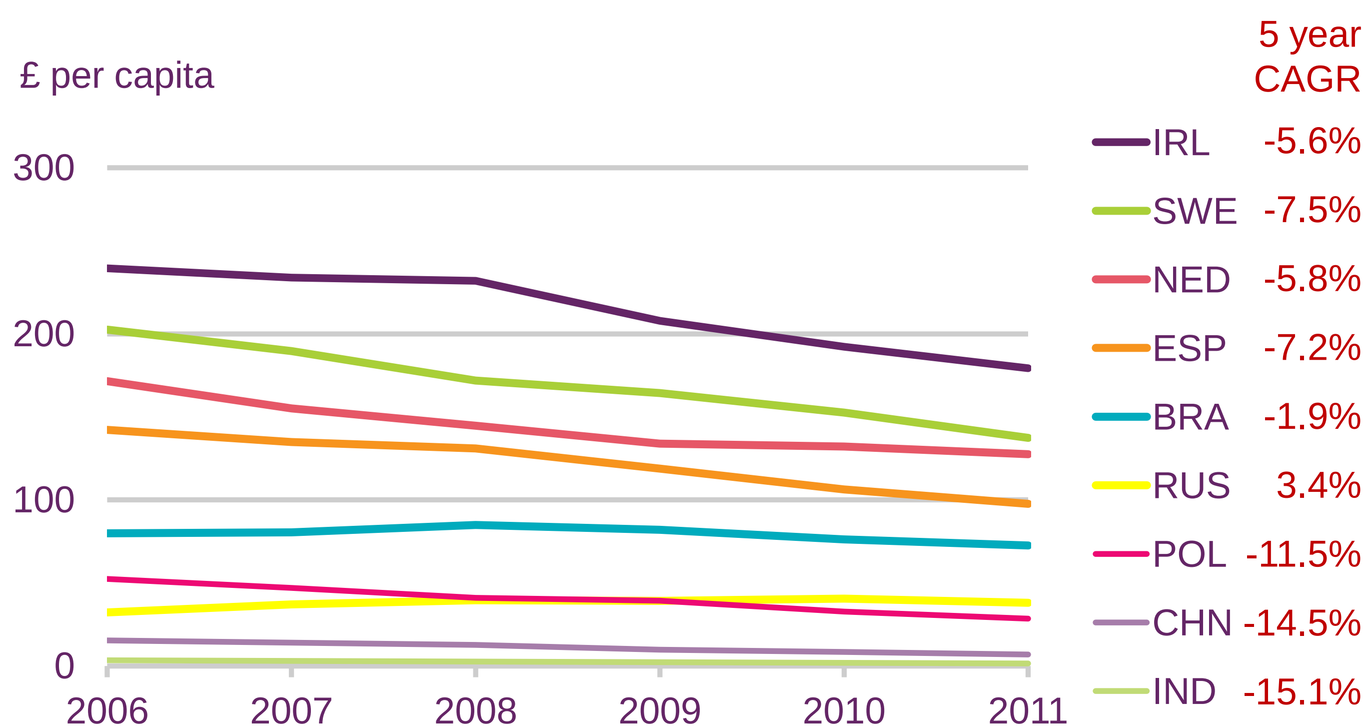
	3 year percentage point change
UK	3.9
FRA	3.3
GER	4.8
ITA	7.4
CAN	1.7
JPN	0.6
AUS	18.6
ESP	4.7
NED	5.3
SWE	11.6
IRL	5.8
POL	5.7

Source: IDATE / industry data / Ofcom

Figure 6.40

Average fixed voice revenue per person, 2006 to 2011

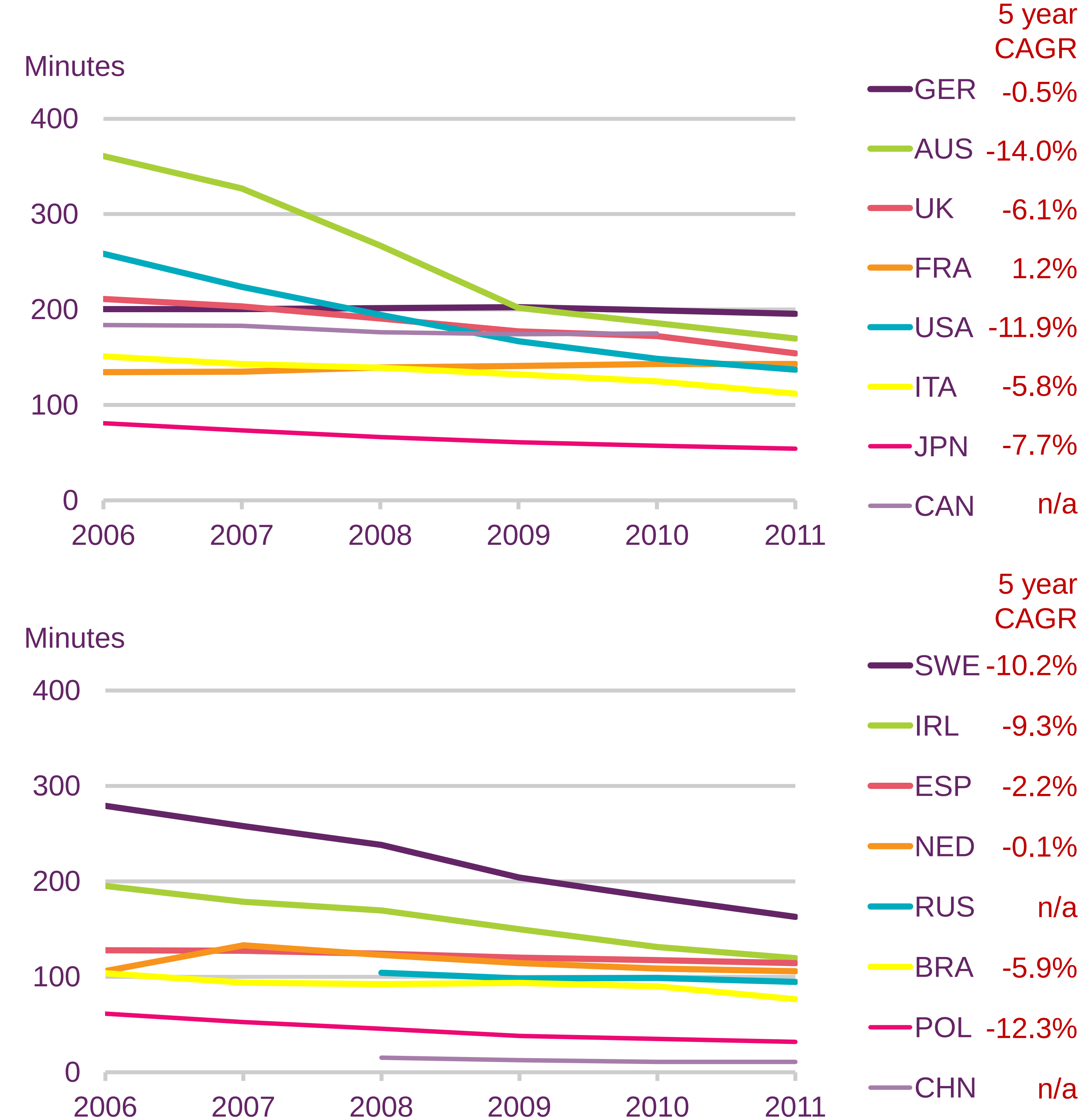




Source: IDATE / industry data / Ofcom

Figure 6.41

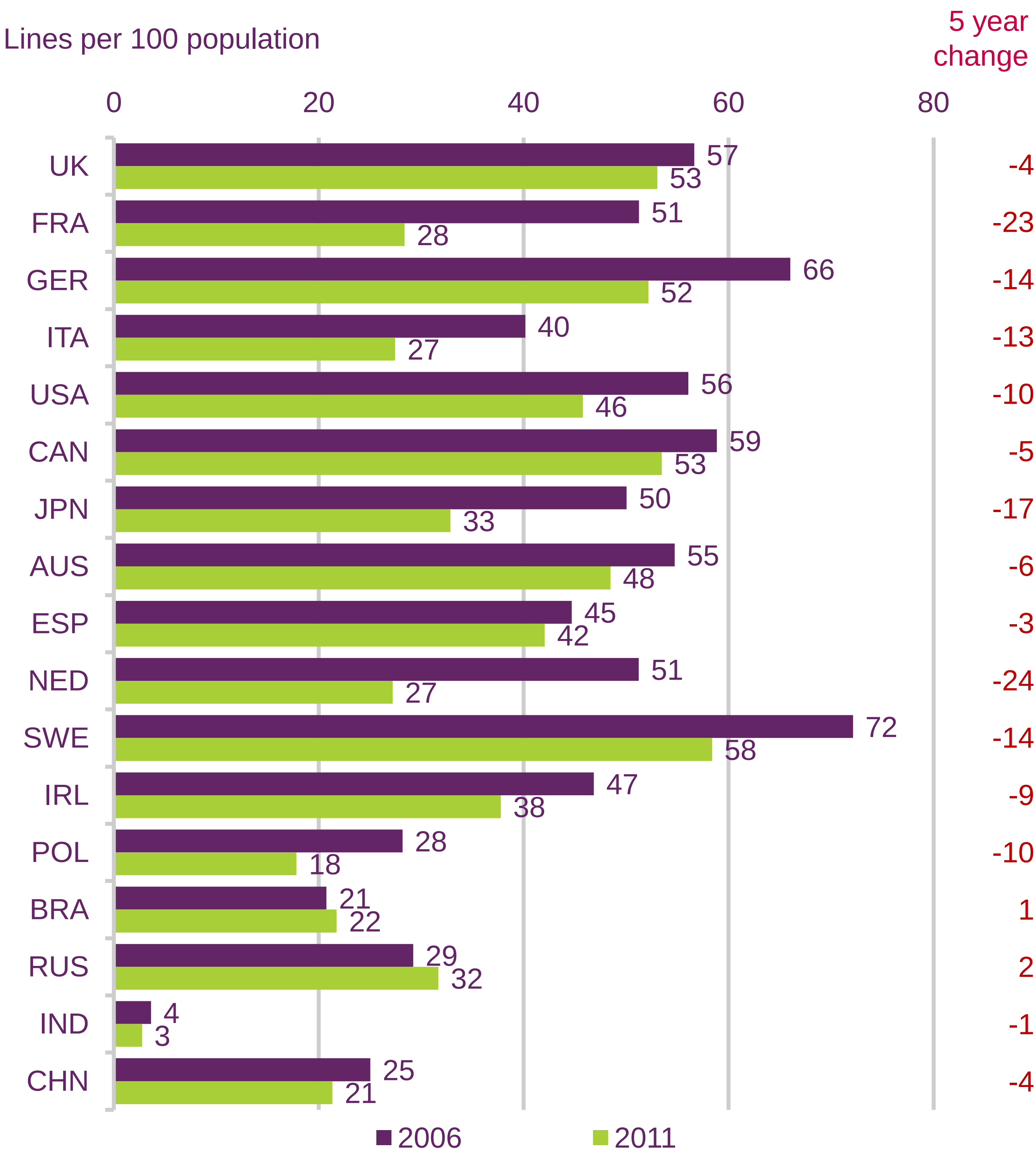
Monthly fixed line voice call minutes per person, 2006 to 2011



Source: IDATE / industry data / Ofcom

Figure 6.42

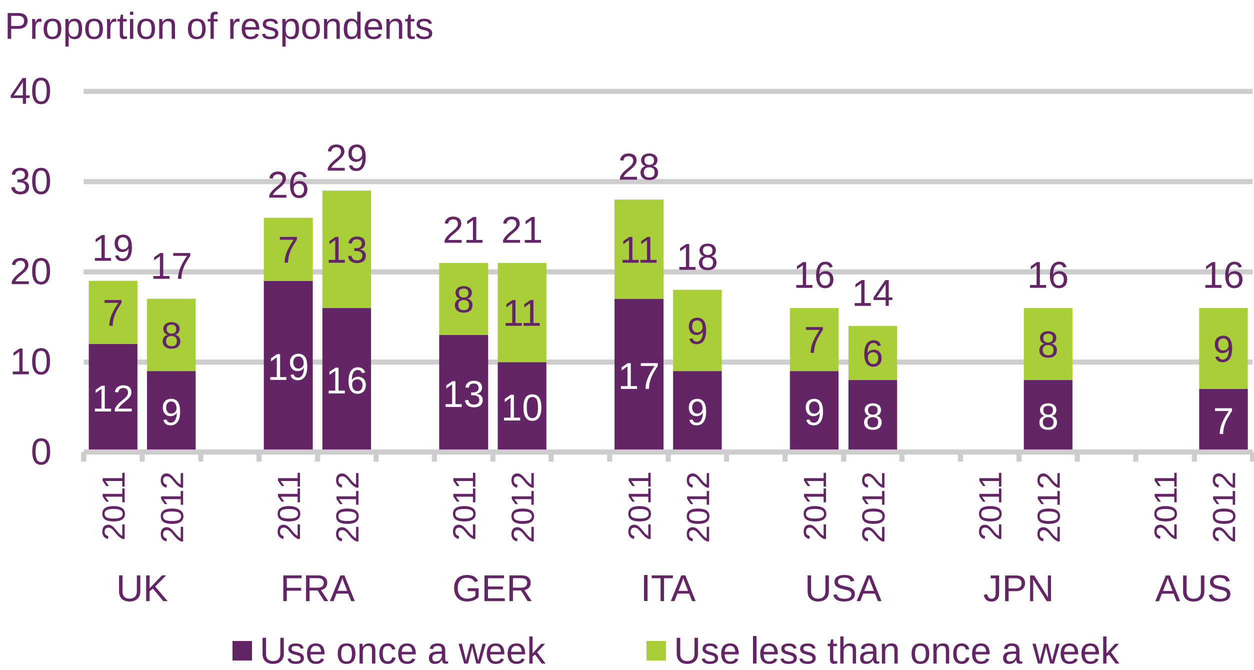
Fixed lines per 100 population, 2006 and 2011



Source: IDATE / industry data / Ofcom

Figure 6.43

Use of VoIP among fixed broadband users, September 2012



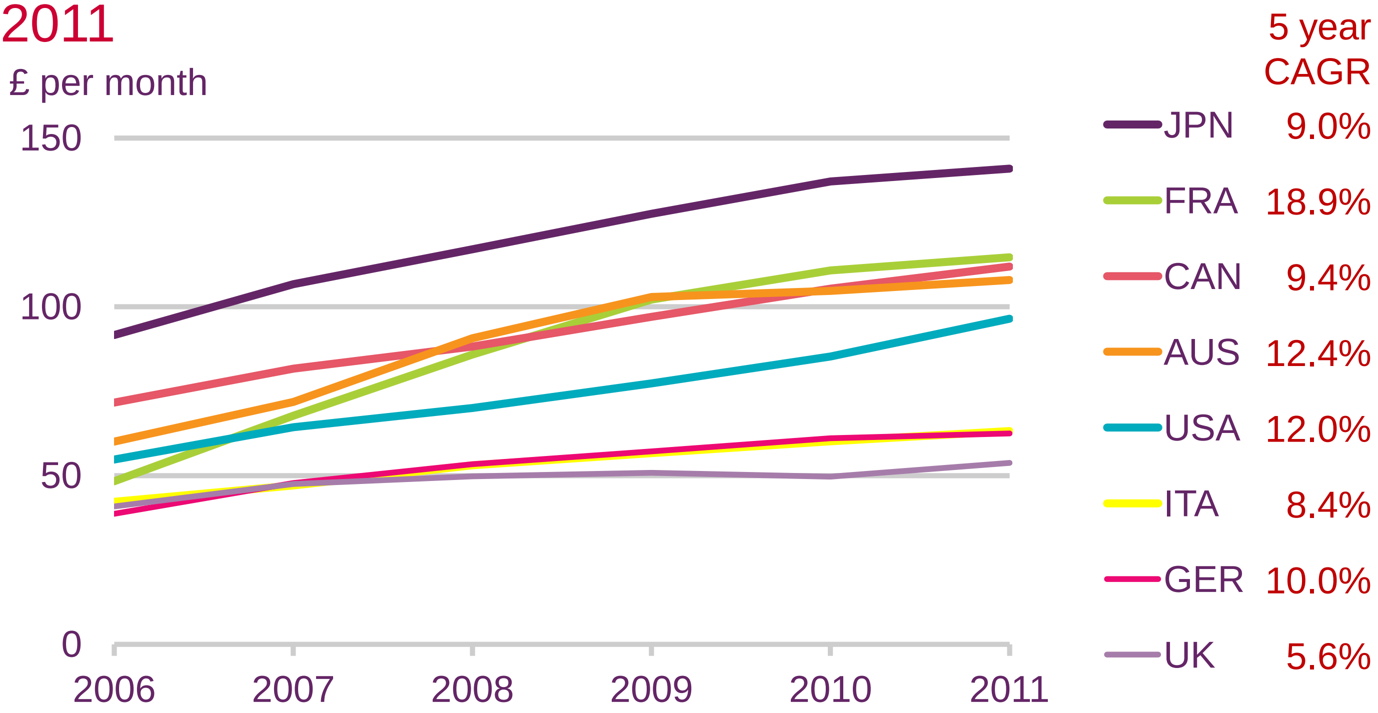
Source: Ofcom research
Base: UK= 945, FRA= 778, GER= 839, ITA= 890, USA= 788, JPN= 792, AUS= 793.
Question: Which, if any, of the following activities do you use your home internet connection for? (multiple choice containing making telephone calls).
Base: all respondents aged 18-64

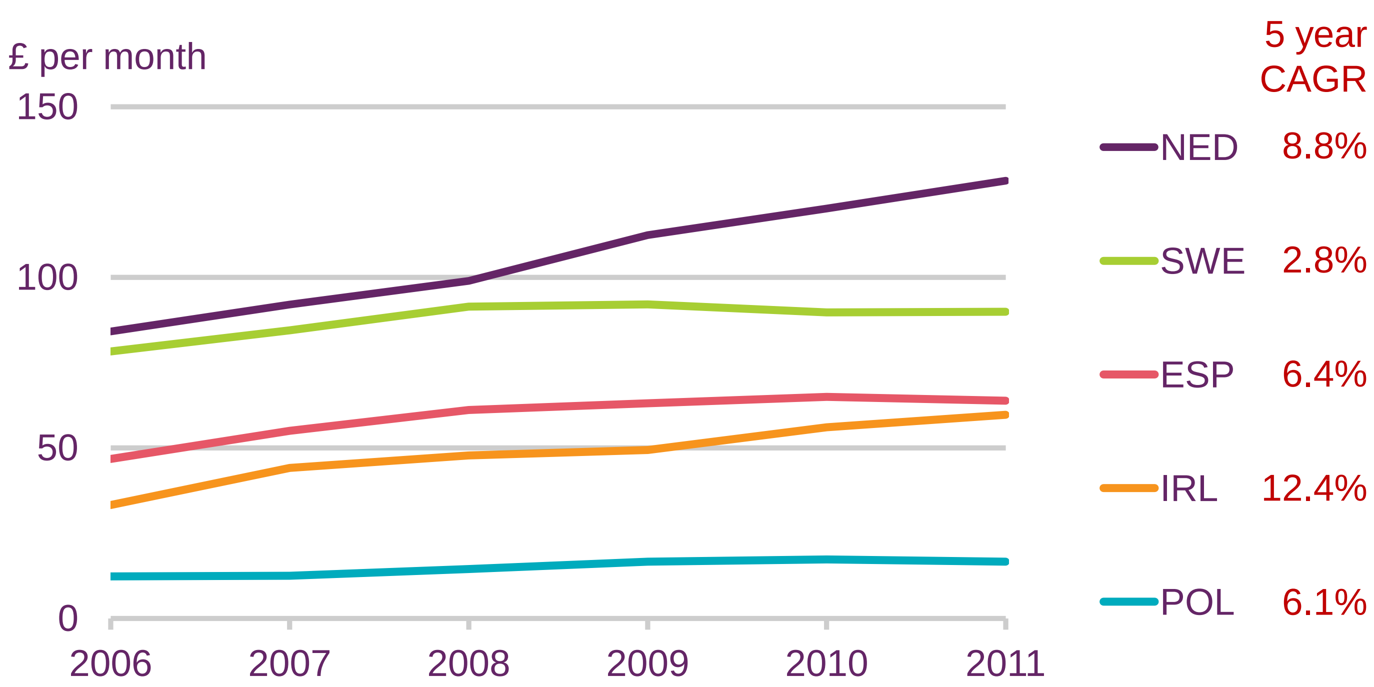
The telecoms user

Fixed broadband services

Figure 6.44

Average fixed broadband revenue per person, 2006 to 2011

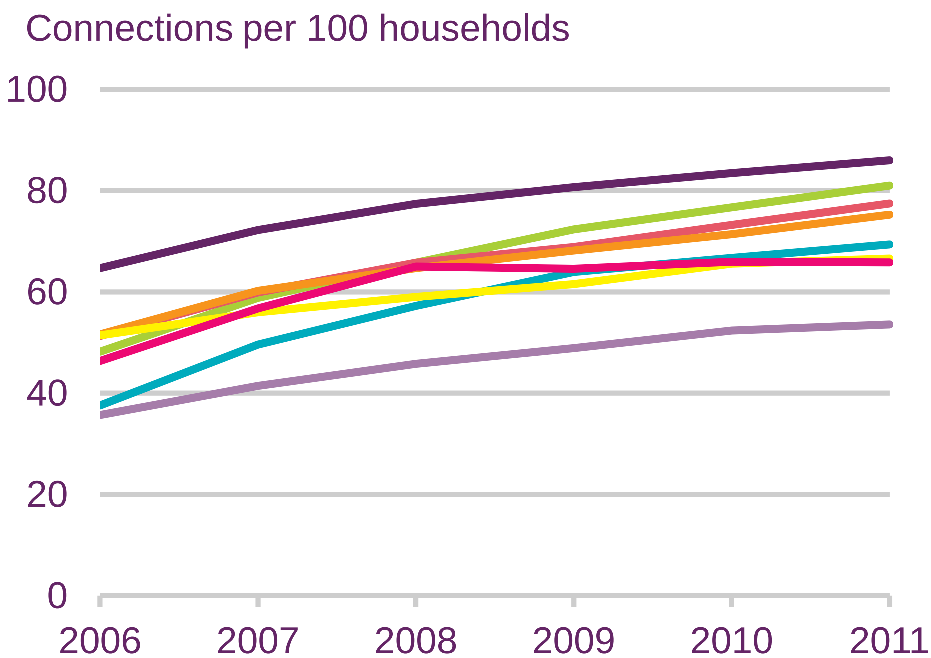




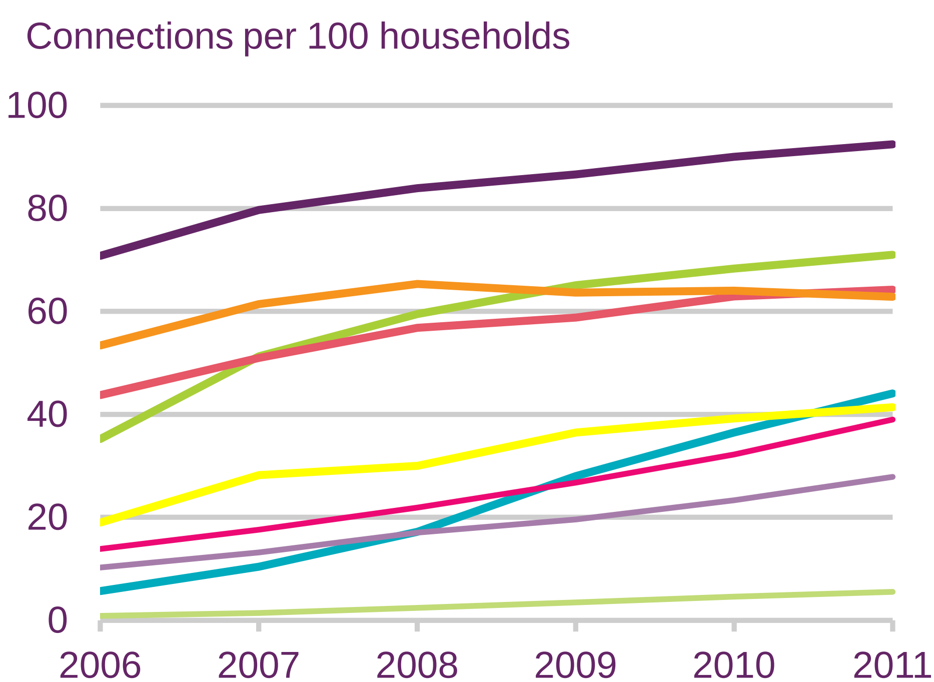
Source: IDATE / industry data / Ofcom

Figure 6.45

Fixed broadband connections per 100 households, 2006 to 2011



	1 year change	5 year change
CAN	3	21
FRA	4	33
UK	4	26
USA	4	24
GER	3	32
JPN	1	15
AUS	0	19
ITA	1	18

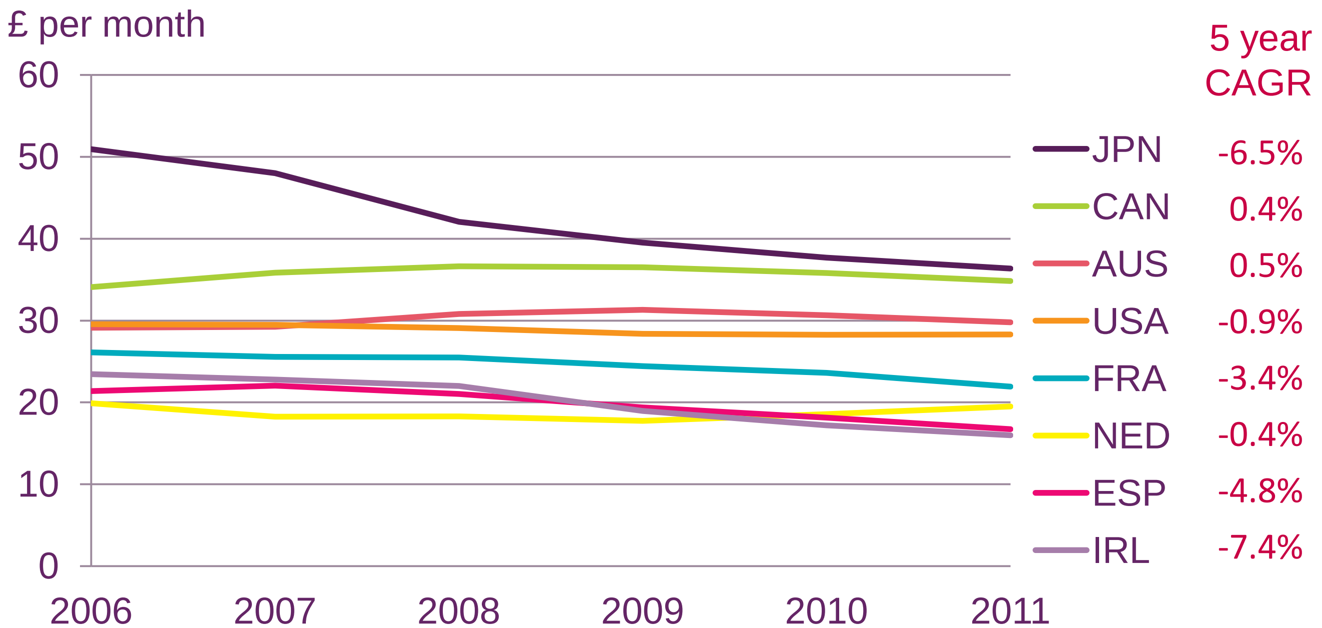


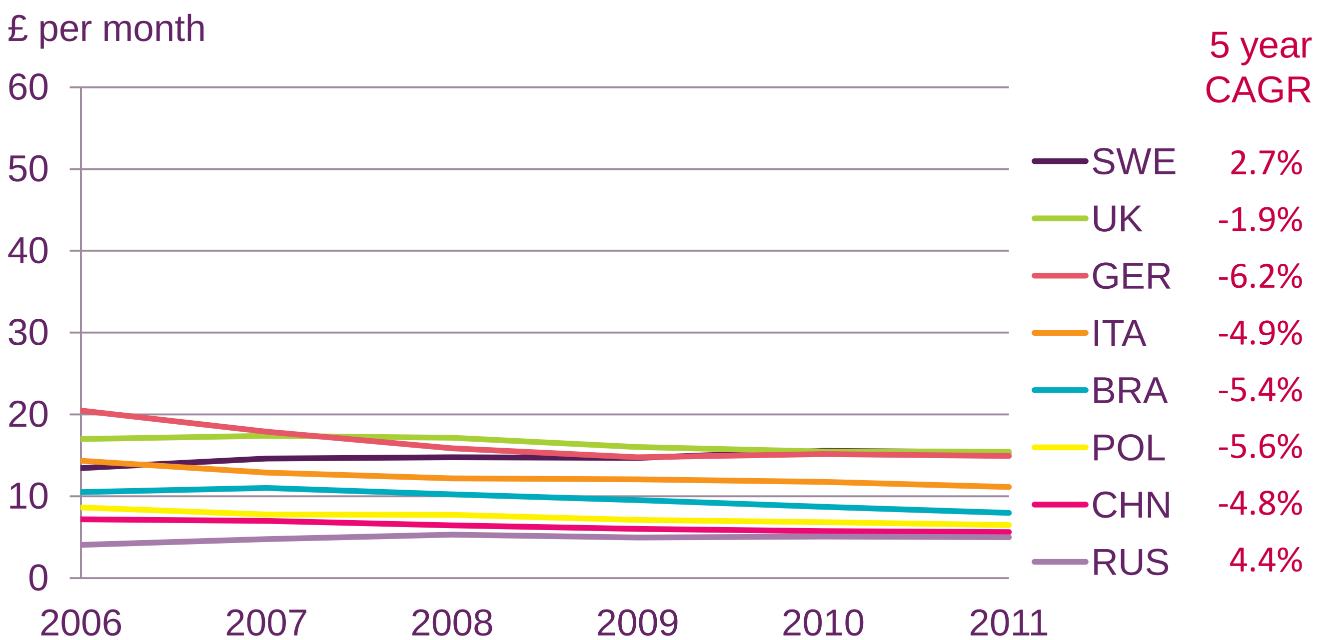
	1 year change	5 year change
NED	2	22
IRL	3	36
ESP	1	21
SWE	-1	9
RUS	8	38
POL	2	22
CHN	7	25
BRA	5	18
IND	1	5

Source: IDATE / industry data / Ofcom

Figure 6.46

Average monthly revenue per mobile connection



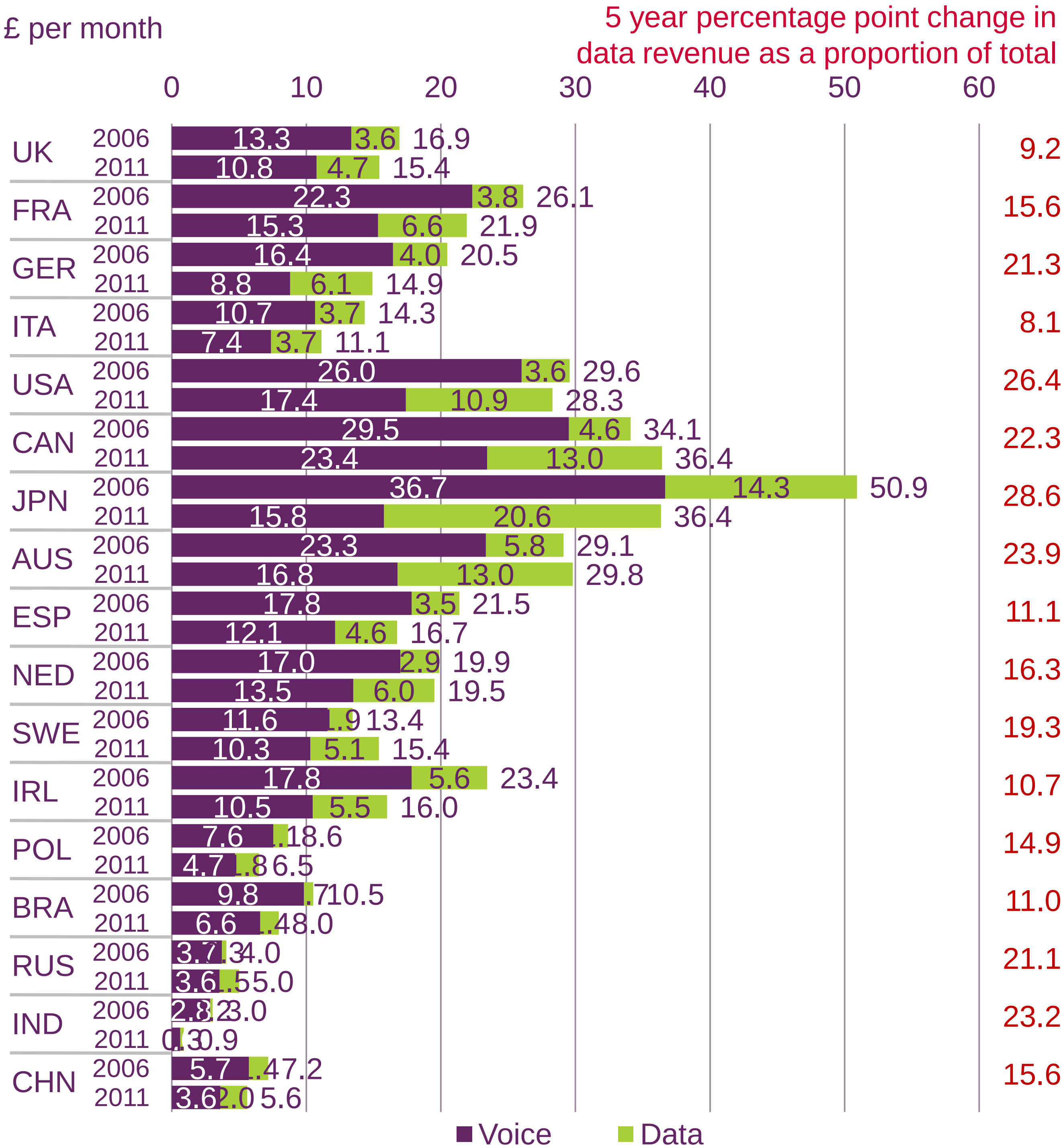


Source: IDATE / industry data / Ofcom

Note: USA, CAN and CHN data includes revenues from incoming calls

Figure 6.47

Average monthly voice and data revenue per mobile connection: 2006 and 2011

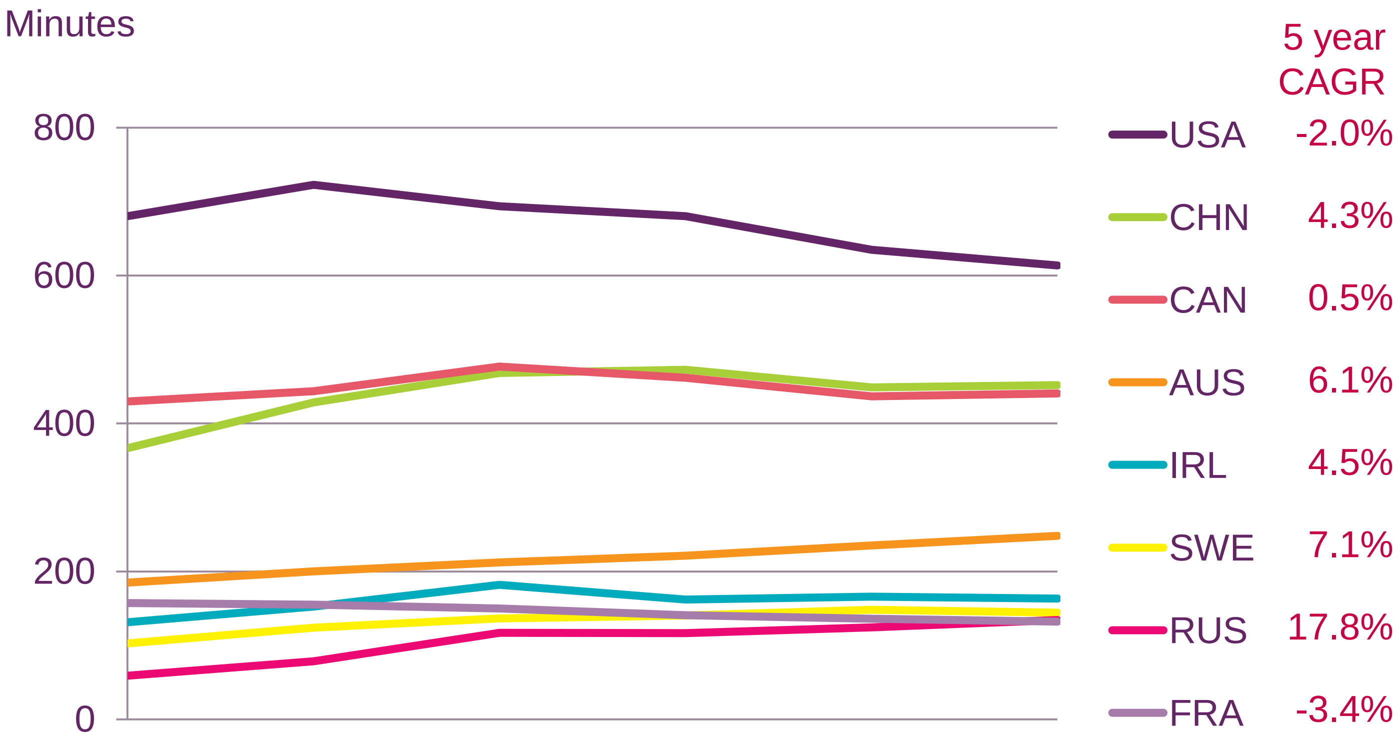


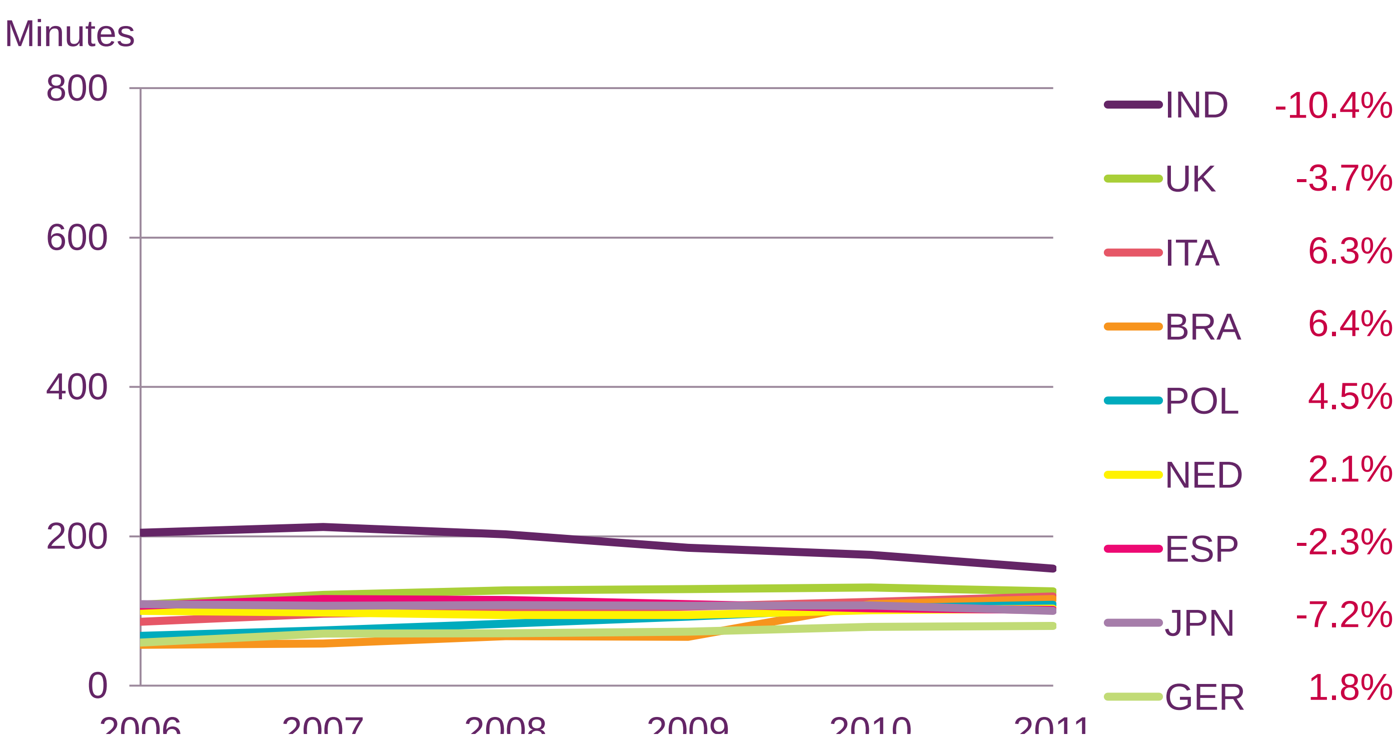
Source: IDATE / industry data / Ofcom

Note: Data includes messaging revenues. CHN, USA and CAN data includes revenues from incoming calls

Figure 6.48

Voice minutes per month per mobile connection: 2006-2011

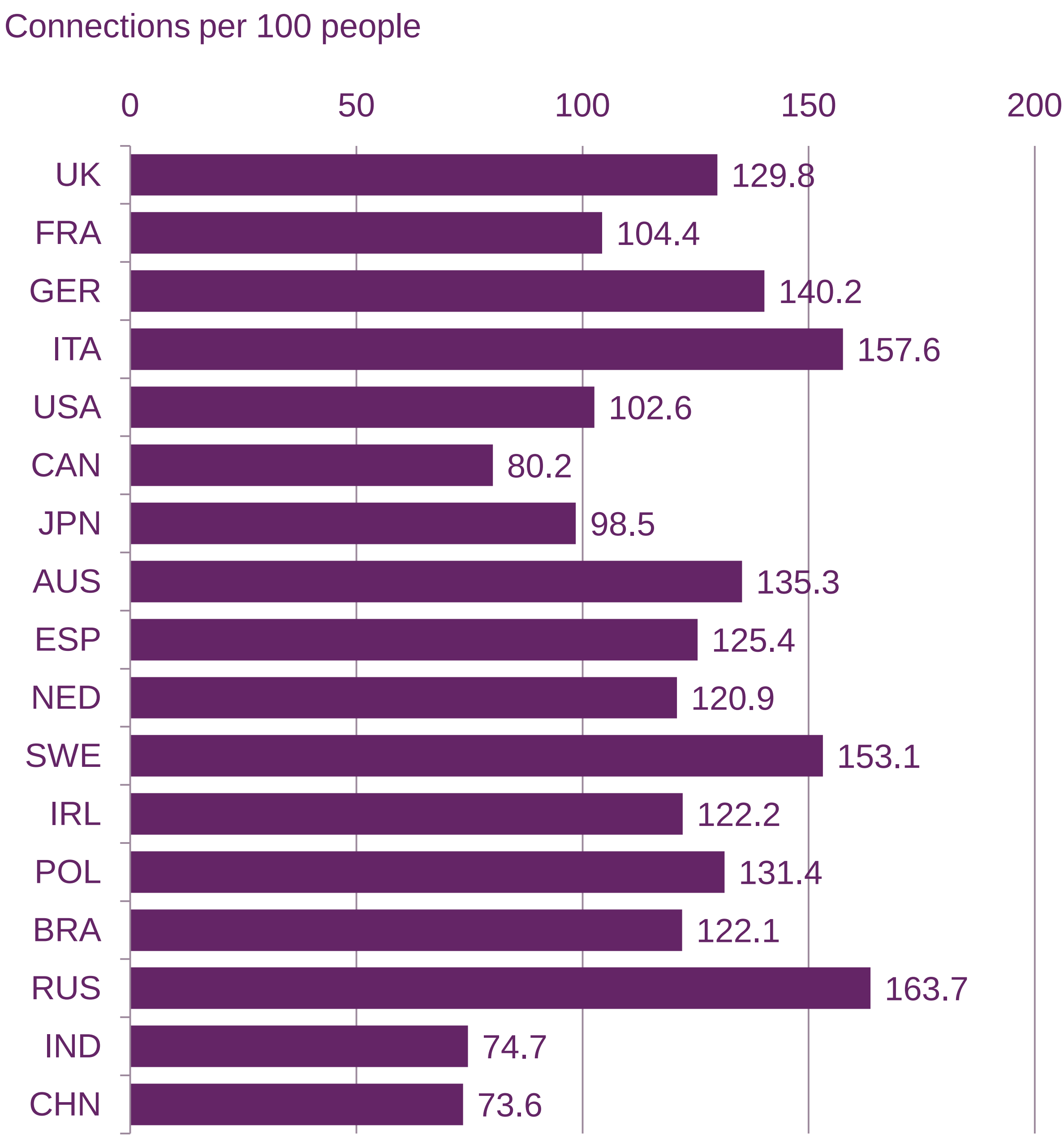




Source: IDATE / industry data / Ofcom

Note: USA, CAN and CHN include incoming calls

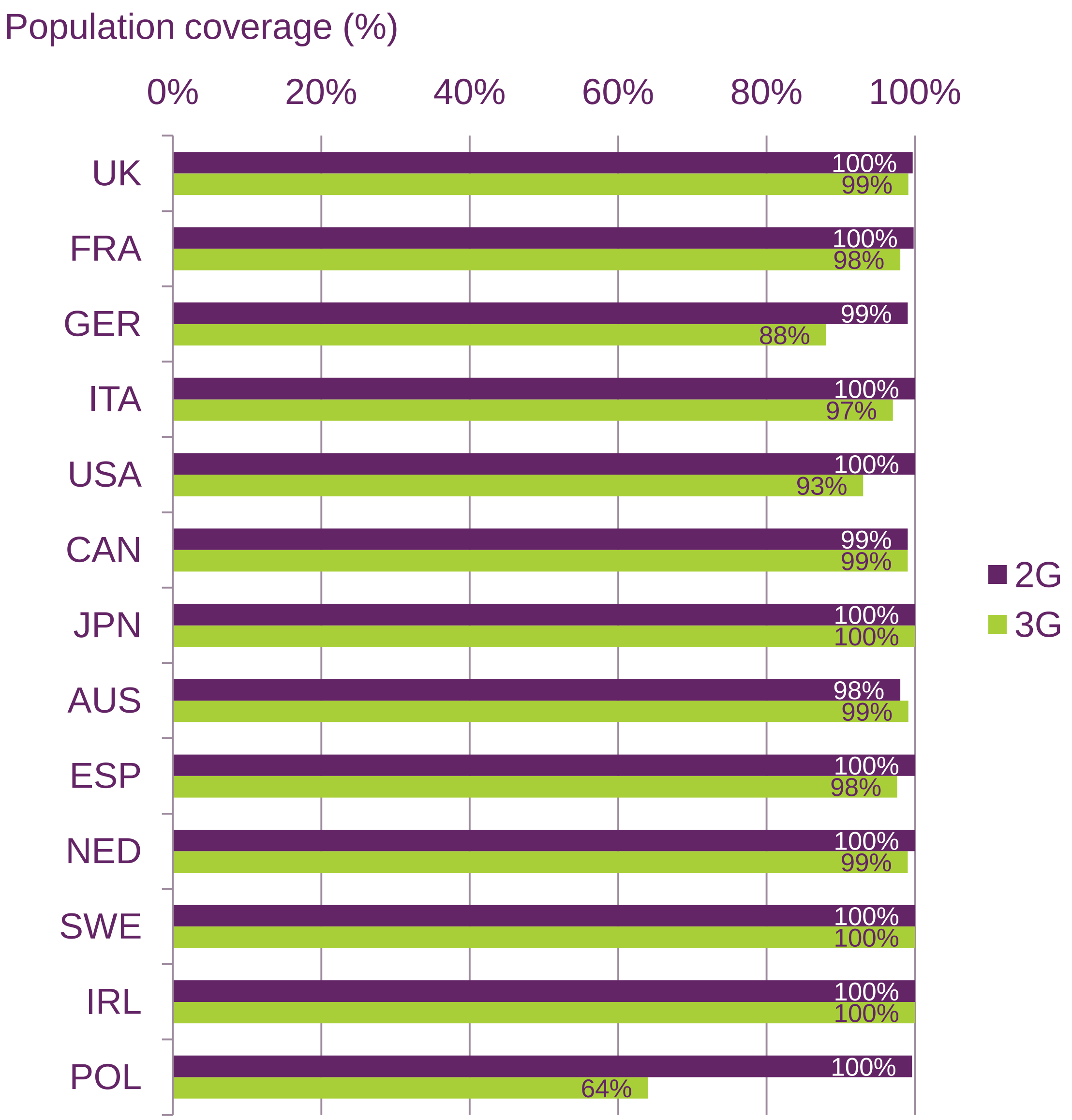
Figure 6.49
Mobile take-up: 2011



Source: IDATE / industry data / Ofcom

Figure 6.50

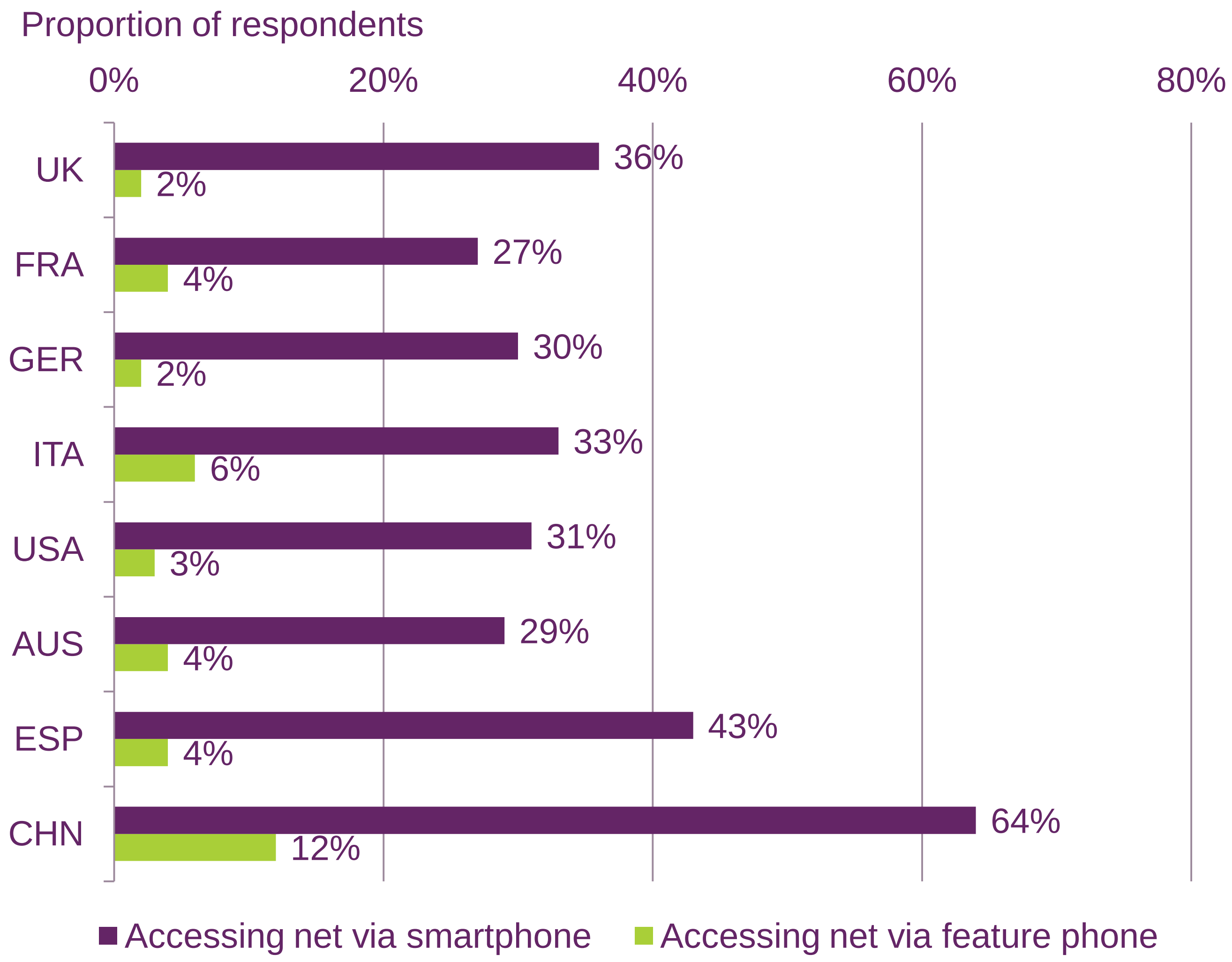
Mobile availability: 2011



Source: IDATE / industry data / Ofcom
Note: All figures rounded to nearest one per cent. UK figures show the percentage of premises that are covered by at least one mobile network. Figures for other comparator countries show population coverage by the operator in each country that covers the largest proportion of the population.

Figure 6.51

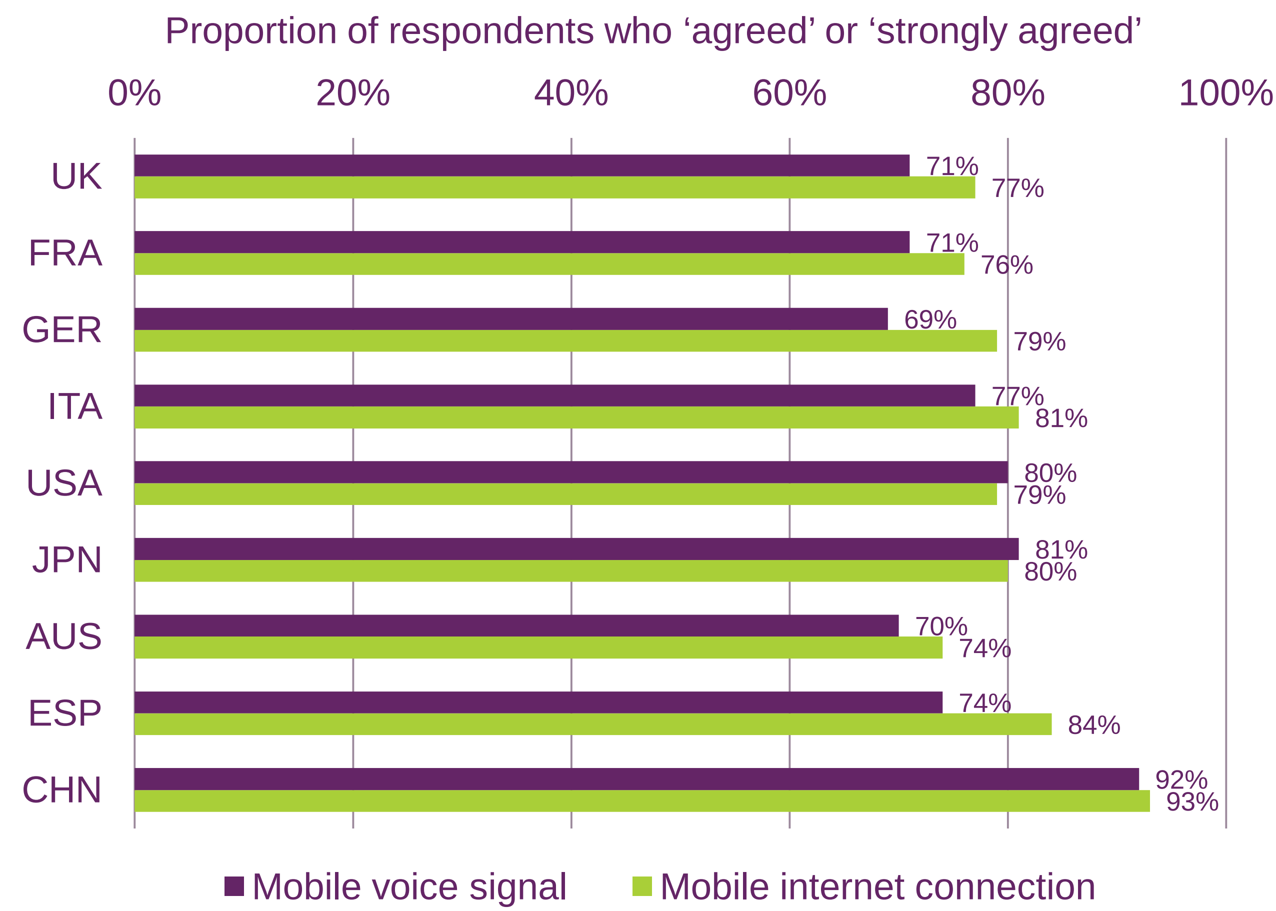
Proportion of respondents who access the internet via a mobile device: 2012



Source: Ofcom consumer research, September 2012
Q.7 Which of the following devices do you use to access the internet generally (e.g. visiting web sites, emailing, online gaming, downloading files)?
Base: All respondents who own and use any devices capable of connecting to the internet (n = 9069)

Figure 6.52

Consumer perceptions of the reliability of mobile voice signal and mobile internet connectivity, 2012



Source: Ofcom consumer research, September 2012
Q.4b Thinking about when you use your mobile phone / smartphone, please select an answer to each of the following: I always have a mobile signal when I want to make a call
Q.4b Thinking about when you use your smartphone, please select an answer to each of the following: I can always connect to the internet when I want to
Base: All respondents who own a smartphone and / or feature phone (n = 8242)