6. Telecoms and networks

Figure 6.1 Key telecoms indicators: 2012

	UK	FRA	GER	ITA	USA	CAN	JPN	AUS
Telecoms service revenues (£bn)	28.1	27.7	32.8	21.1	190.8	22.6	92.4	17.1
Telecoms revenues per capita (£)	445	421	404	343	605	657	725	770
Fixed telephone lines per 100 popn	53	27	48	26	44	51	30	46
Monthly outbound fixed minutes per capita	135	140	183	104	124	-	37	50
Mobile connections per 100 population	132	111	139	159	104	81	101	139
Share of mobile post-pay connections	52	75	47	19	87	86	99	61
3G/4G as % of all connections	54	45	30	43	61	56	100	57
Monthly outbound mobile minutes per capita	174	151	113	196	608	364	95	165
Monthly outbound mobile messages per capita	226	232	61	130	579	234	0	107
Fixed broadband connections per 100 population	34	36	35	22	29	34	31	27
FTTx as a proportion of fixed broadband connections	5	4	1	3	9	1	59	2
Mobile broadband connections per 100 population	8	5	7	14	53	4	11	27
VoIP subscriptions per 100 population	7	34	14	9	13	14	24	15

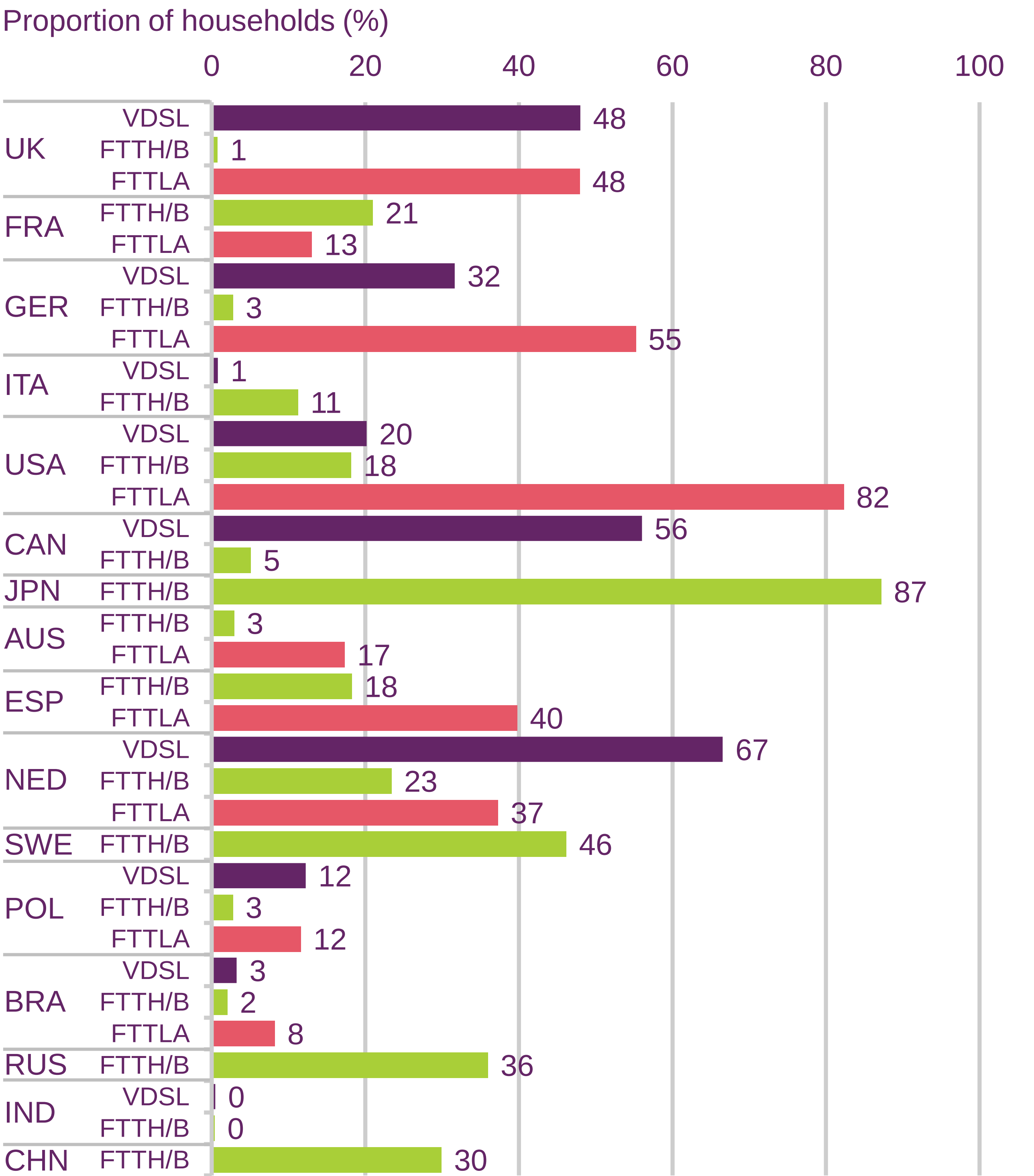
	ESP	NED	SWE	IRL	POL	BRA	RUS	IND	CHN
Telecoms service revenues (£bn)	16.2	8.1	4.5	2.3	5	31.7	18.9	10.1	77.6
Telecoms revenues per capita (£)	344	483	489	474	131	158	133	8	58
Fixed telephone lines per 100 popn	40	23	55	35	14	22	30	3	21
Monthly outbound fixed minutes per capita	108	106	140	105	28	72	-	-	10
Mobile connections per 100 population	113	125	161	123	141	131	162	71	83
Share of mobile post-pay connections	67	75	69	40	46	19	4	4	35
3G/4G as % of all connections	70	39	89	74	31	20	25	3	21
Monthly outbound mobile minutes per capita	123	112	222	192	150	115	237	124	397
Monthly outbound mobile messages per capita	10	39	151	216	114	-	-	-	-
Fixed broadband connections per 100 population	24	41	34	23	15	9	19	1	13
FTTx as a proportion of fixed broadband connections	3	7	34	1	1	1	28	2	16
Mobile broadband connections per 100 population	5	7	23	12	11	-	-	-	-
VoIP subscriptions per 100 population	4	28	16	6	3	-	-	-	-

Source: IDATE / industry data / Ofcom

Note: Figures for the US include other forms of mobile text messaging than SMS and are not directly comparable to those for the other comparator countries

Figure 6.2

Availability of NGA networks: end 2012

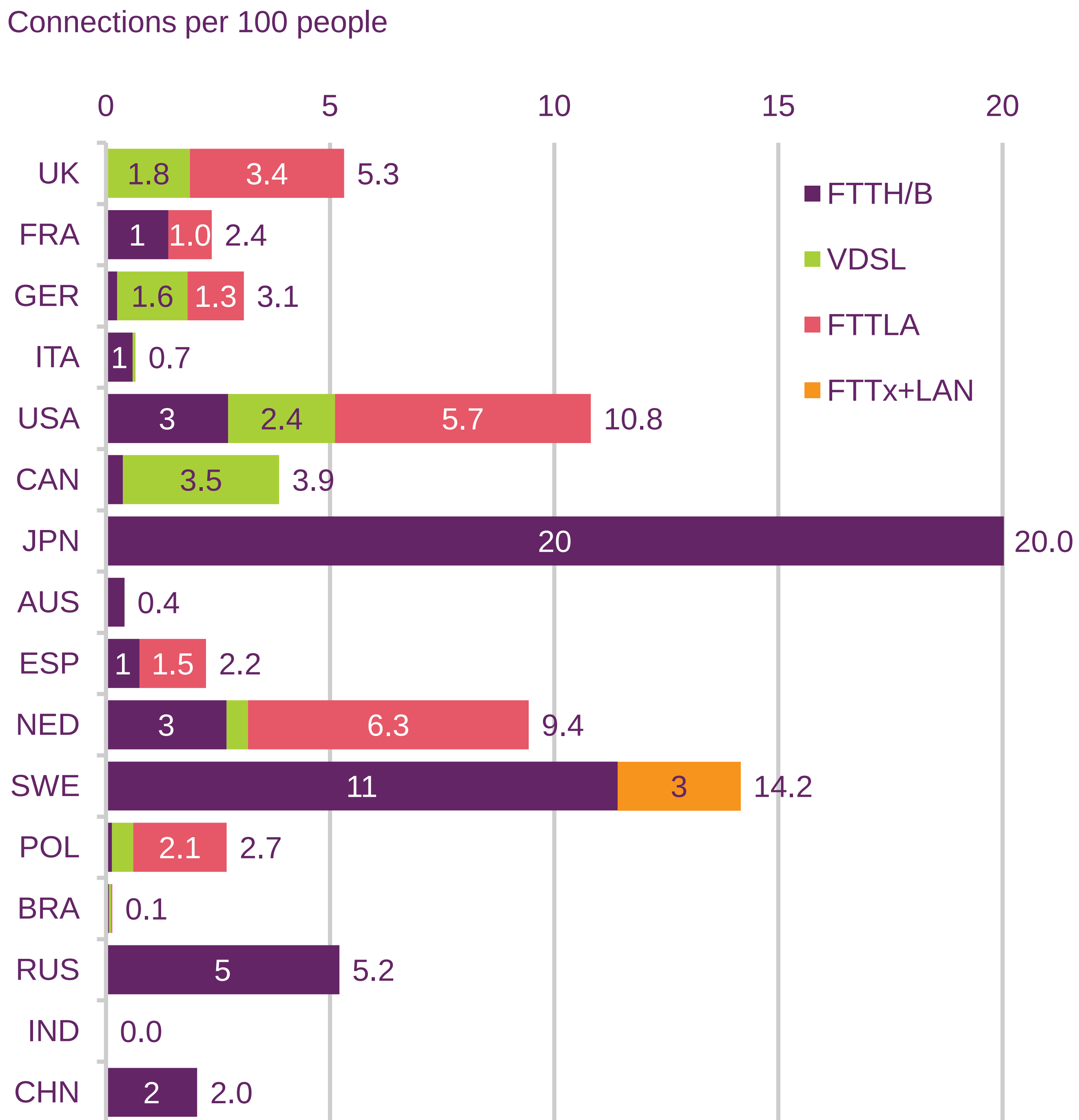


Source: IDATE / industry data / Ofcom

Ofcom

Figure 6.3

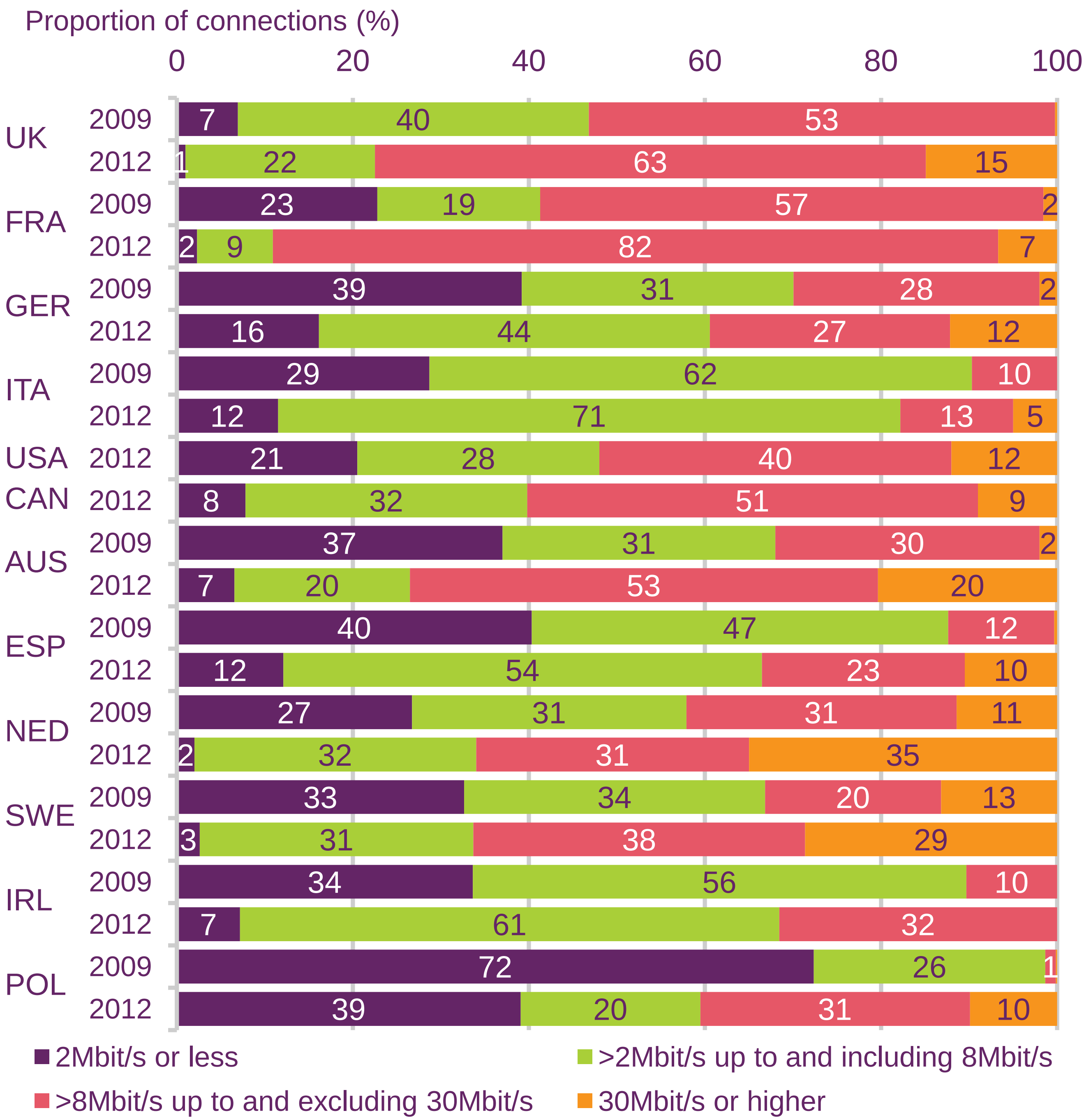
NGA connections per 100 people, by technology: 2012



Source: FTTx Watch service, IDATE 2013 / industry data / Ofcom

Figure 6.4

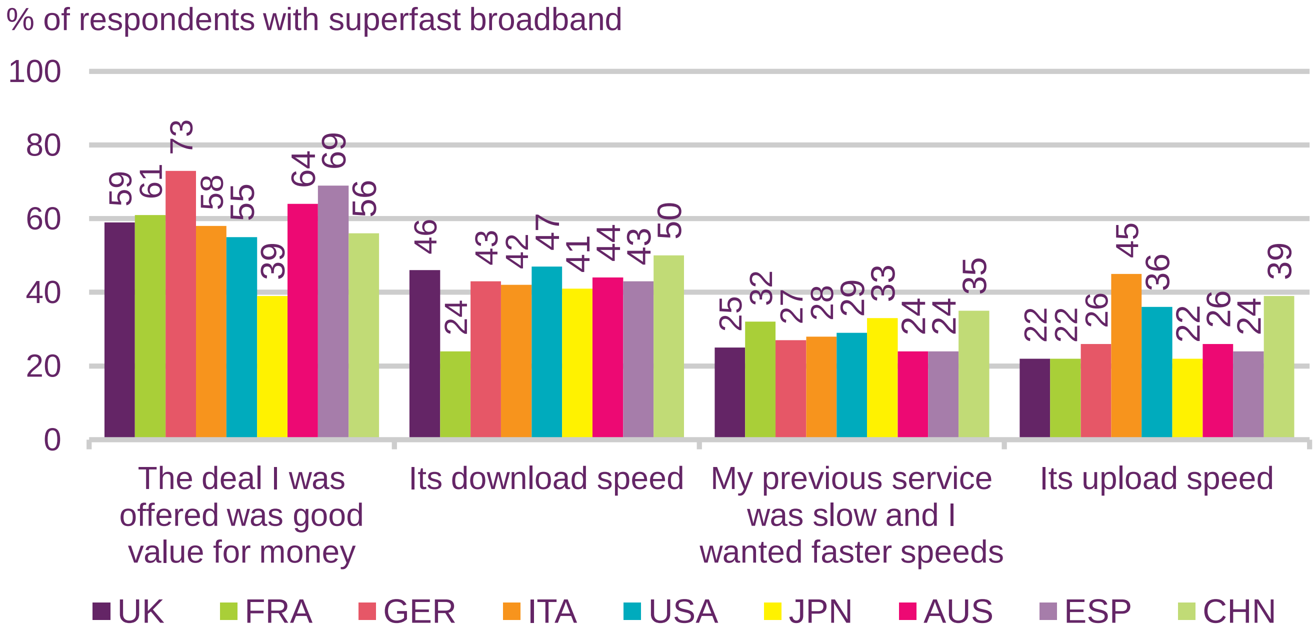
Fixed broadband connections, by headline speed: 2009 and 2012

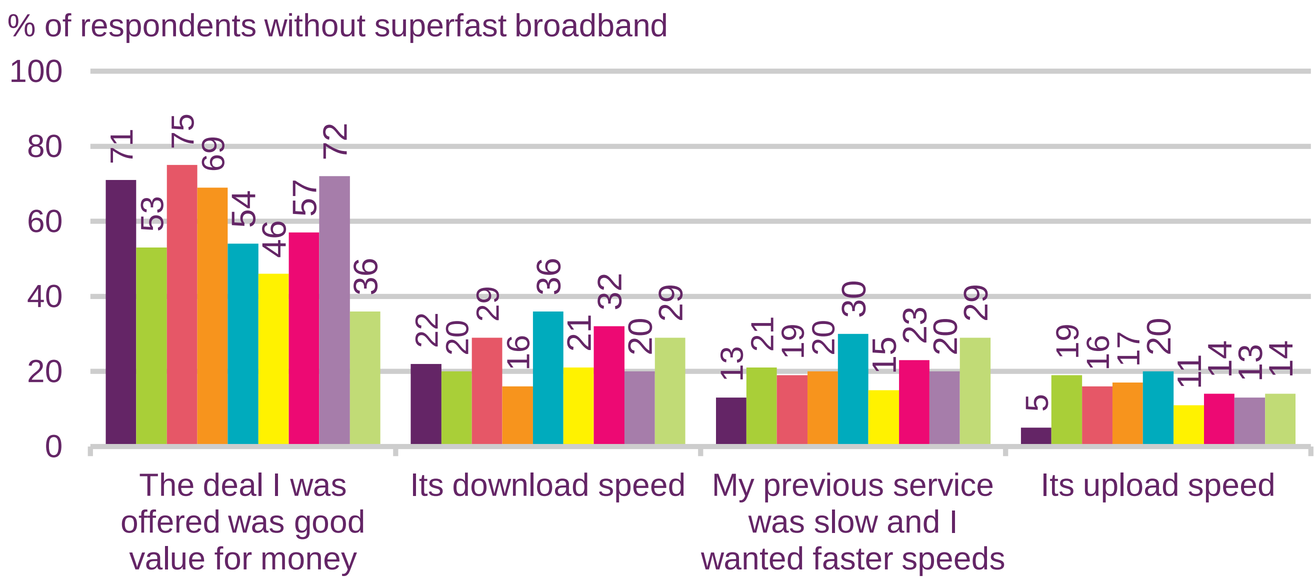


Source: IDATE / Ofcom / operator data

Figure 6.5

Reason for choosing current fixed broadband service

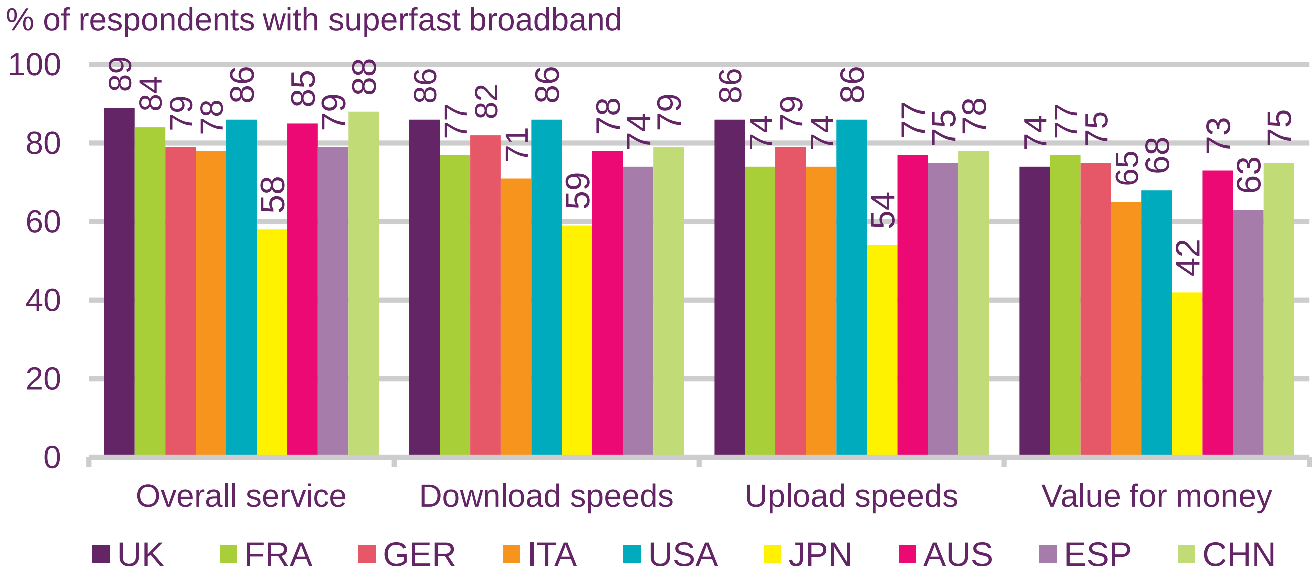


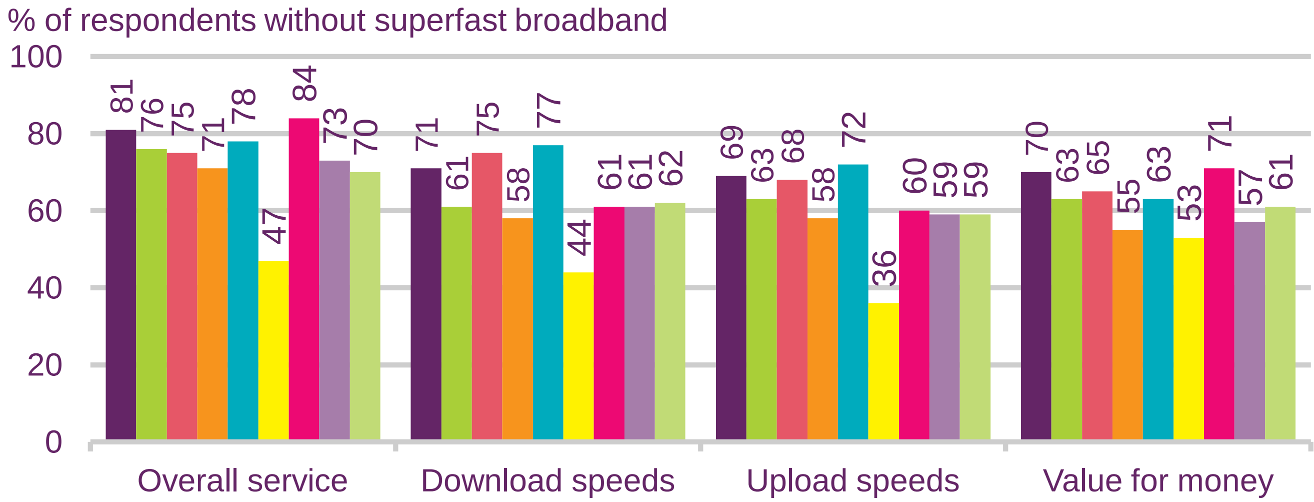


Source: Ofcom research, September 2013

Figure 6.6

Satisfaction with current fixed broadband service



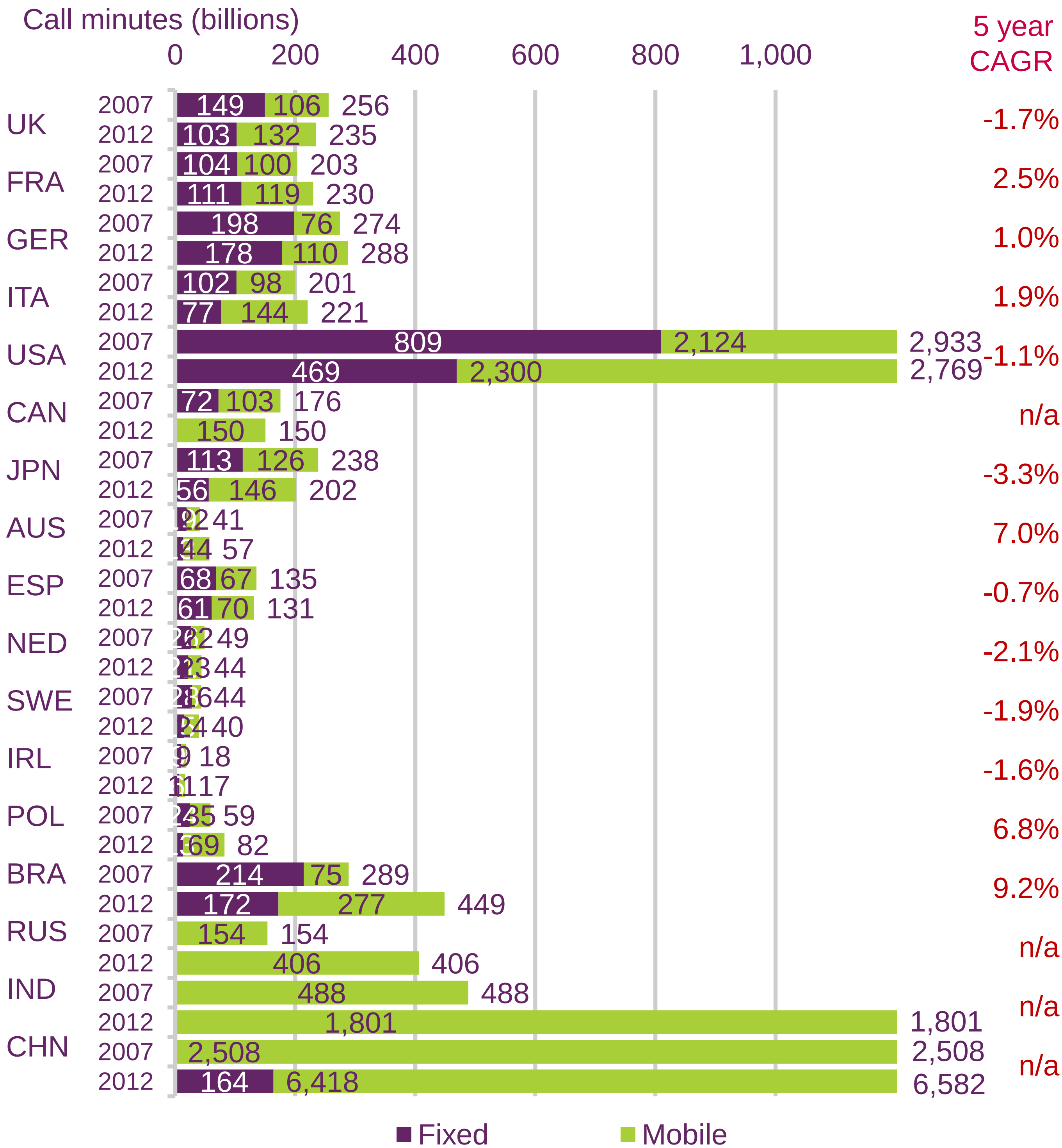


Source: Ofcom research, September 2013

Voice

Figure 6.7

Total telecoms voice call volumes, by sector: 2007 to 2012

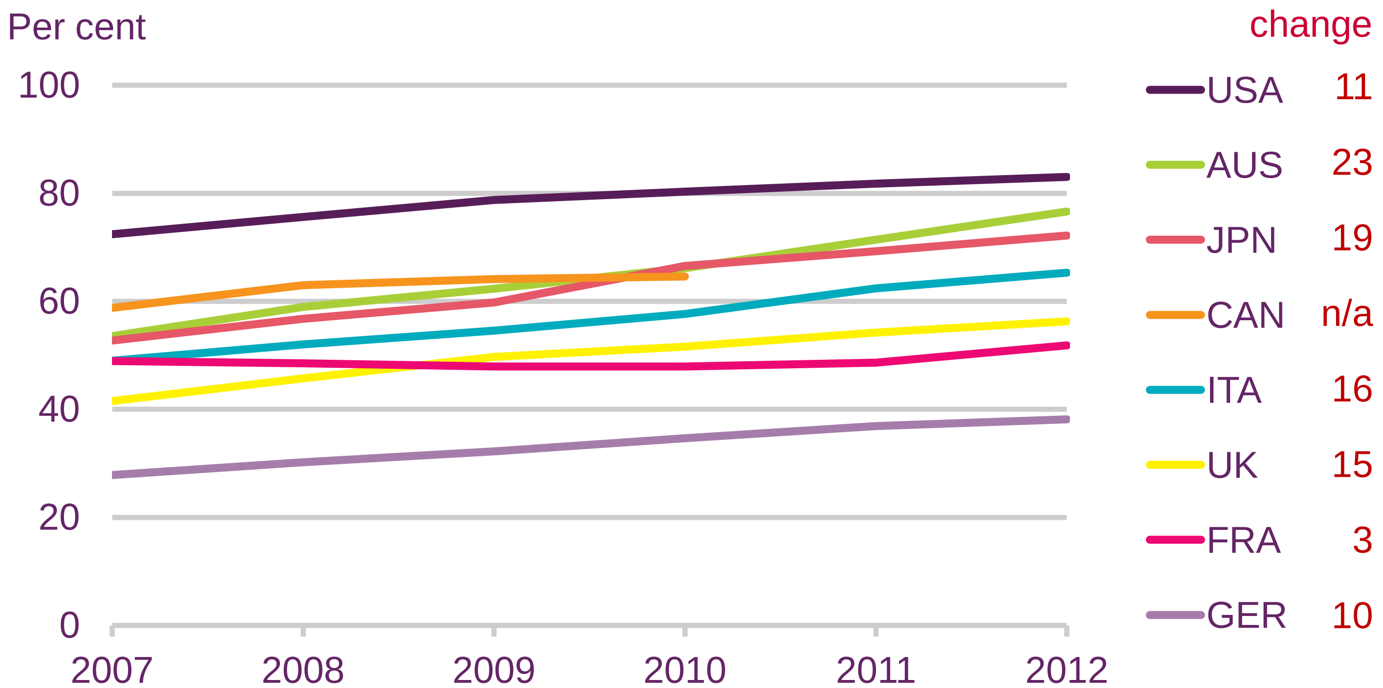


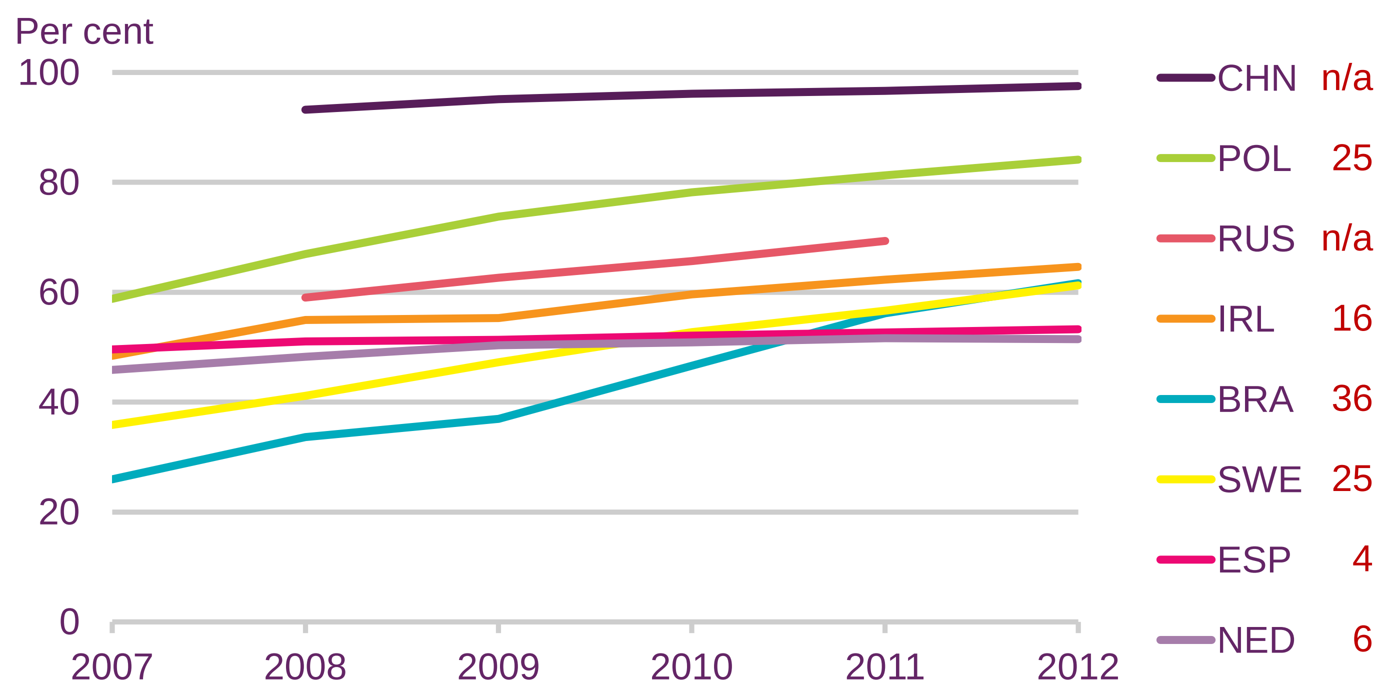
Source: IDATE / industry data / Ofcom

Note: Figures for USA, CAN and CHN include incoming calls

Figure 6.8

Proportion of voice call minutes originating on mobiles: 2007 to 2012



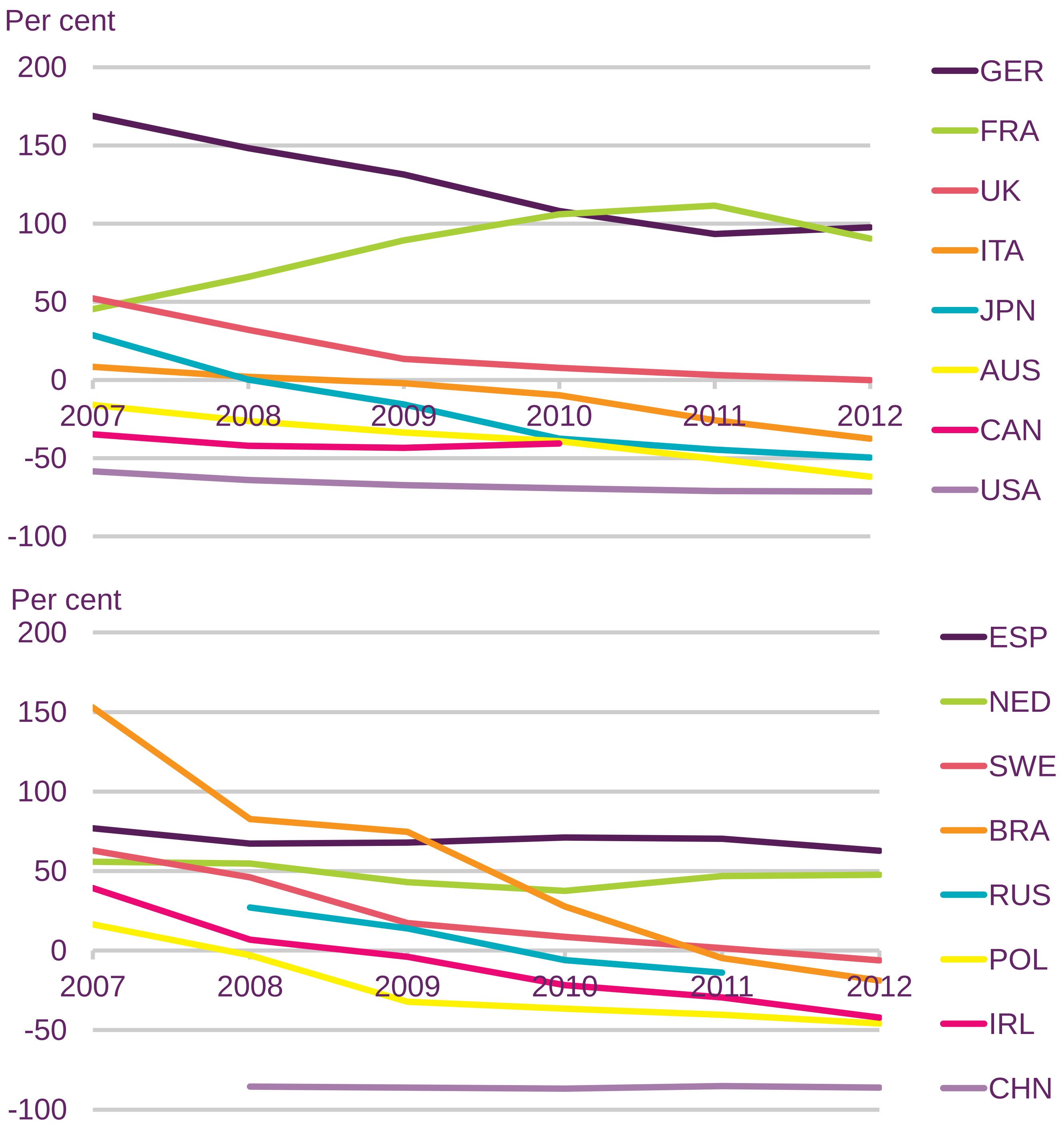


Source: IDATE / industry data / Ofcom

Note: Figures for USA, CAN and CHN include incoming calls

Figure 6.9

Average price premium of a mobile voice call minute over a fixed call minute: 2007 to 2012

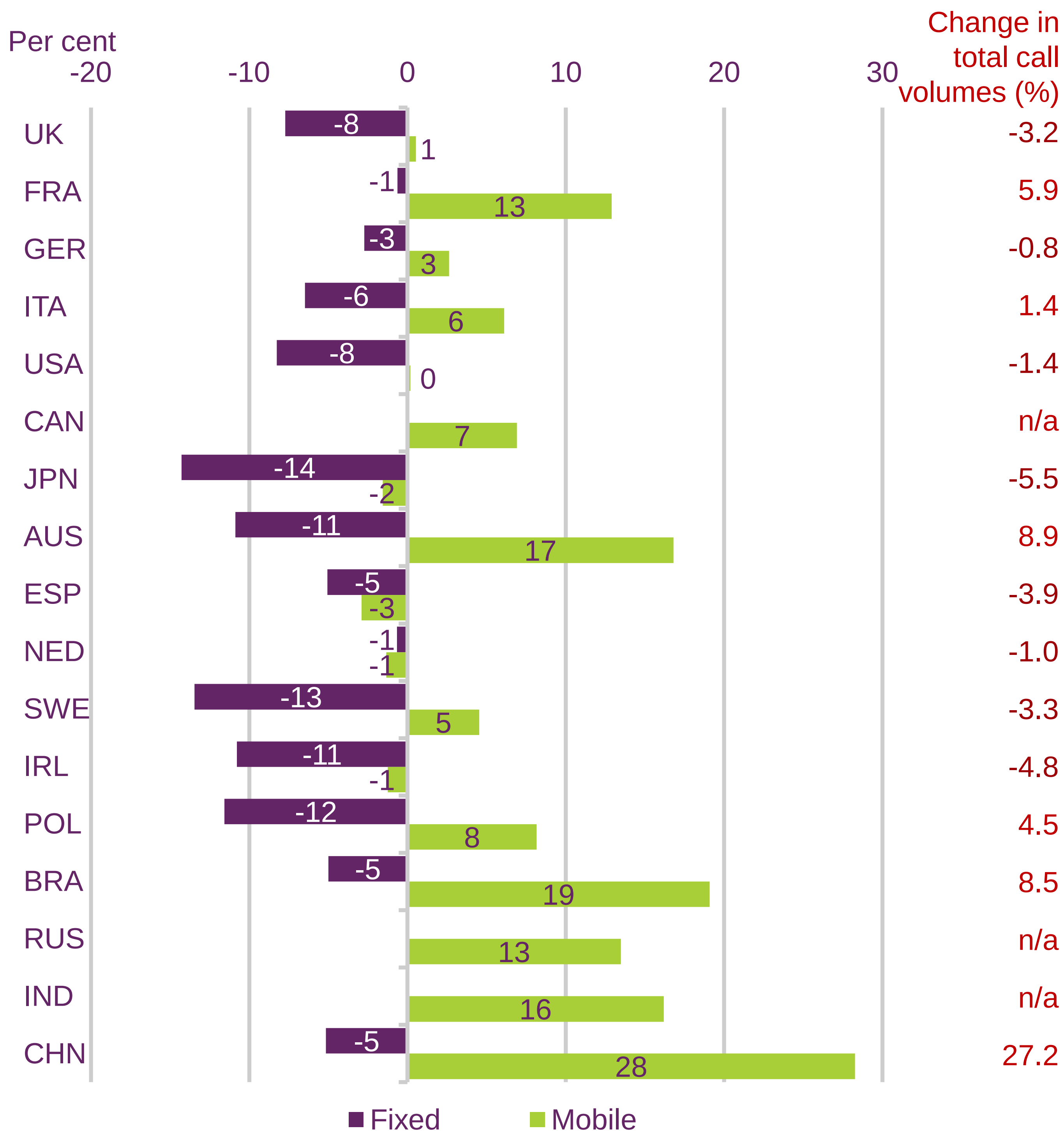


Source: IDATE / industry data / Ofcom

Note: The average fixed and mobile pence-per-minute values used to calculate the price premiums shown include the monthly access charge, and as such may include revenues relating to bundled mobile messaging and data services.

Figure 6.10

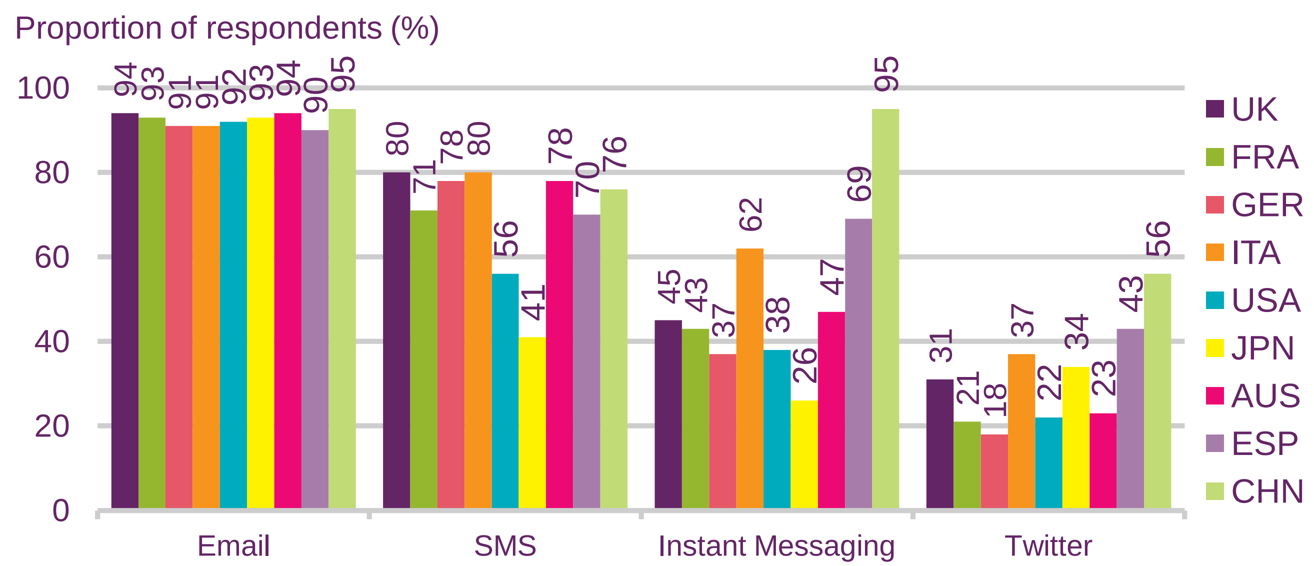
Change in fixed and mobile voice call volumes: 2012



Source: IDATE / industry data / Ofcom

Figure 6.11

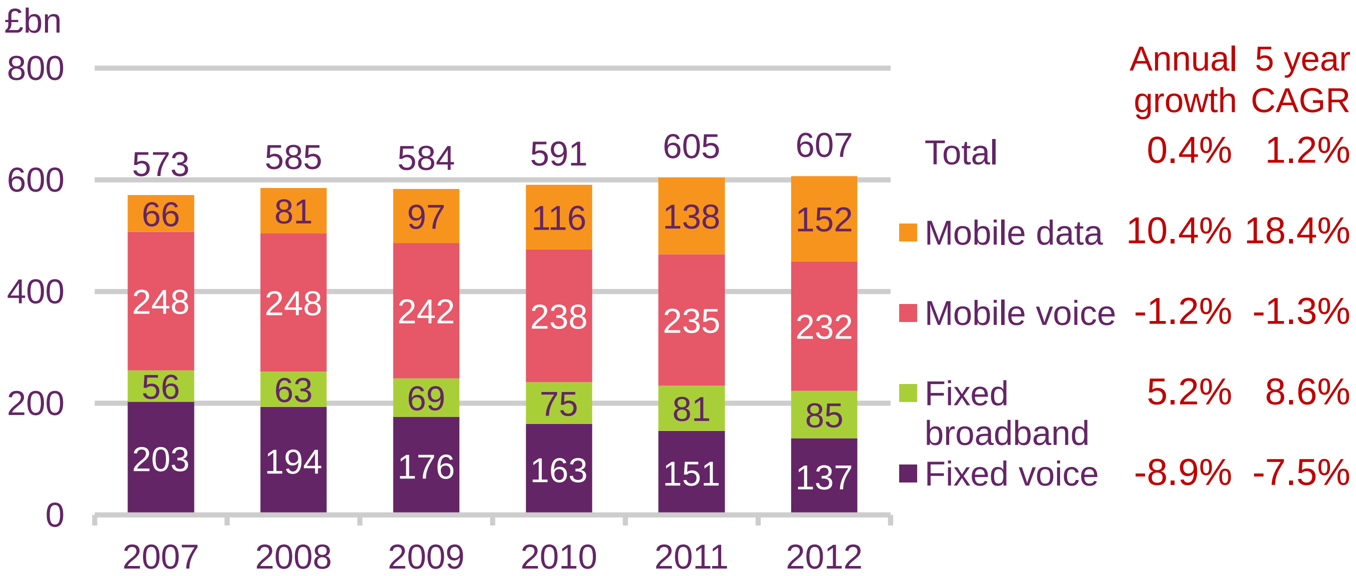
Use of alternatives to traditional voice calls



Source: Ofcom research, September 2013
Base: All respondents
Note: Research conducted online

Figure 6.12

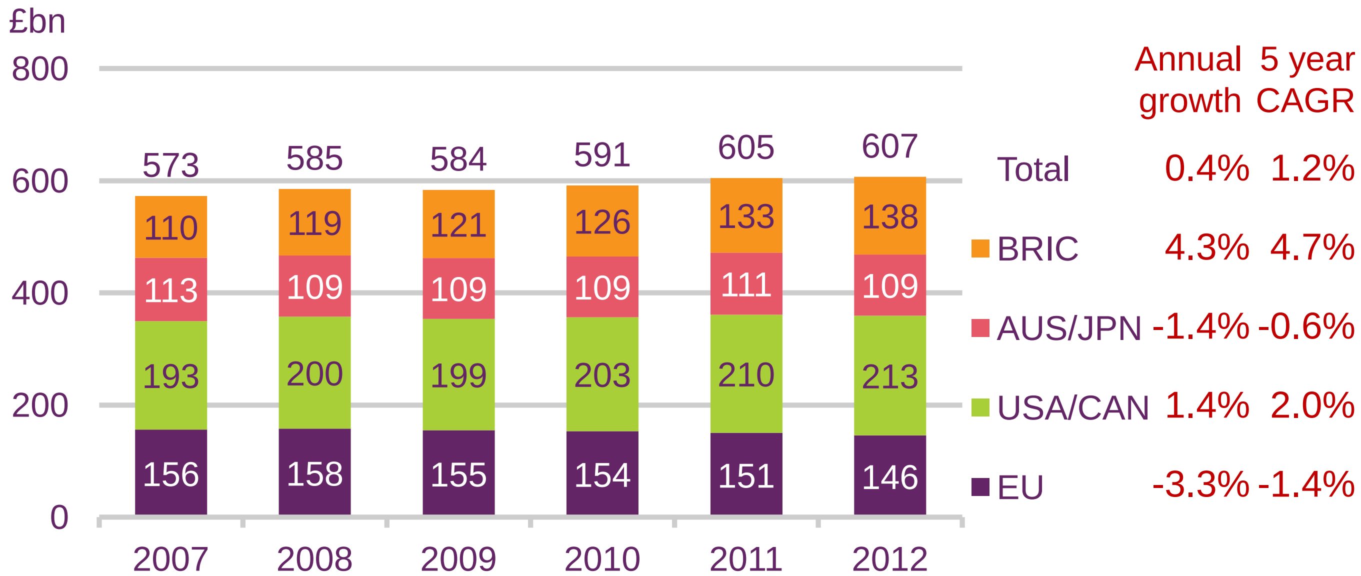
Total comparator country retail telecoms revenue, by sector: 2007 to 2012



Source: IDATE / industry data / Ofcom
Note: Fixed broadband revenues exclude the BRIC countries; voice revenues include access/line rental revenues and may include revenues relating to bundled data services.

Figure 6.13

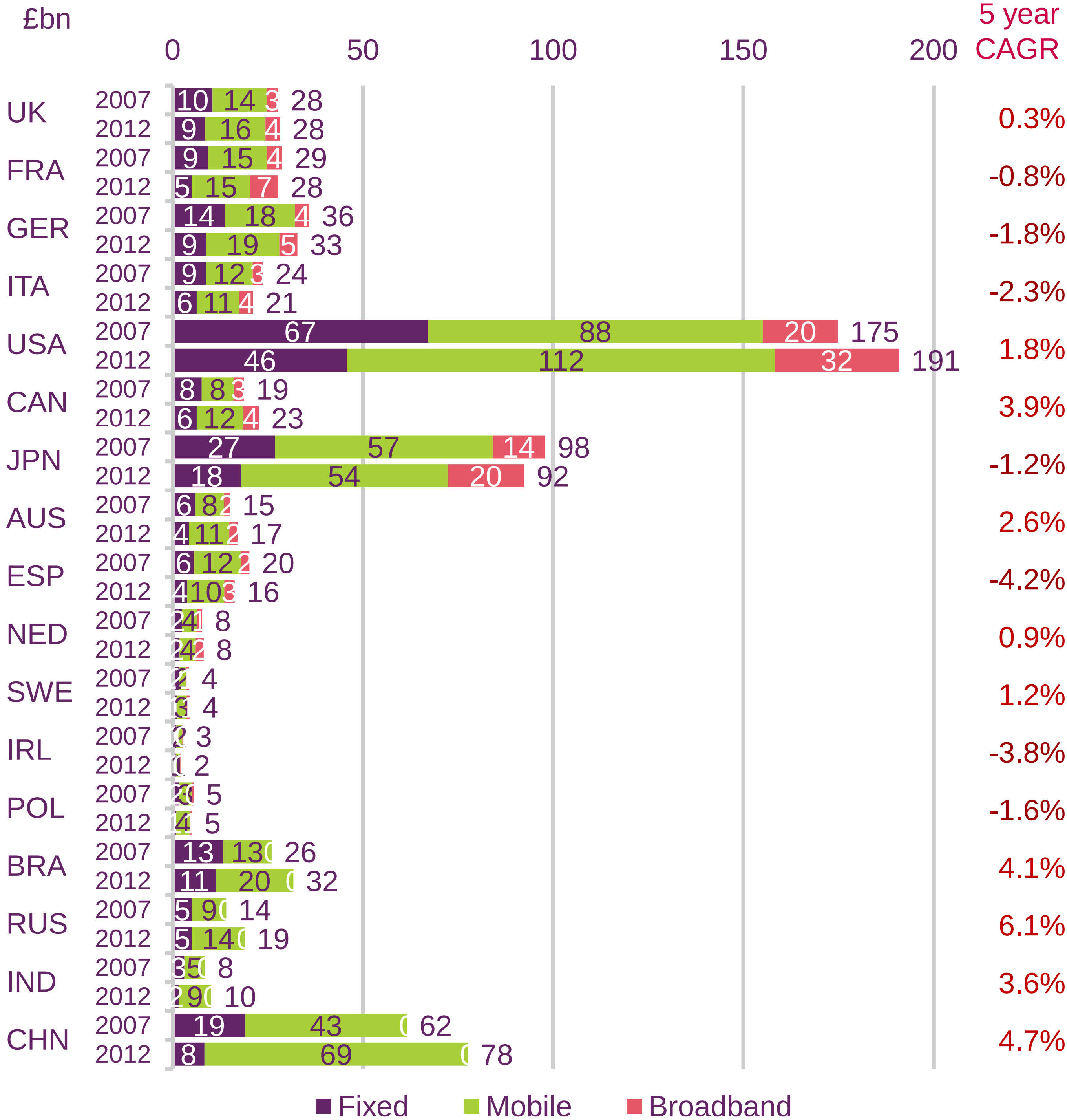
Total comparator country retail telecoms revenue, by country type: 2007 to 2012



Source: IDATE / industry data / Ofcom
Note: Figures for the BRIC countries exclude fixed broadband revenues

Figure 6.14

Telecoms service retail revenues, by sector: 2007 and 2012

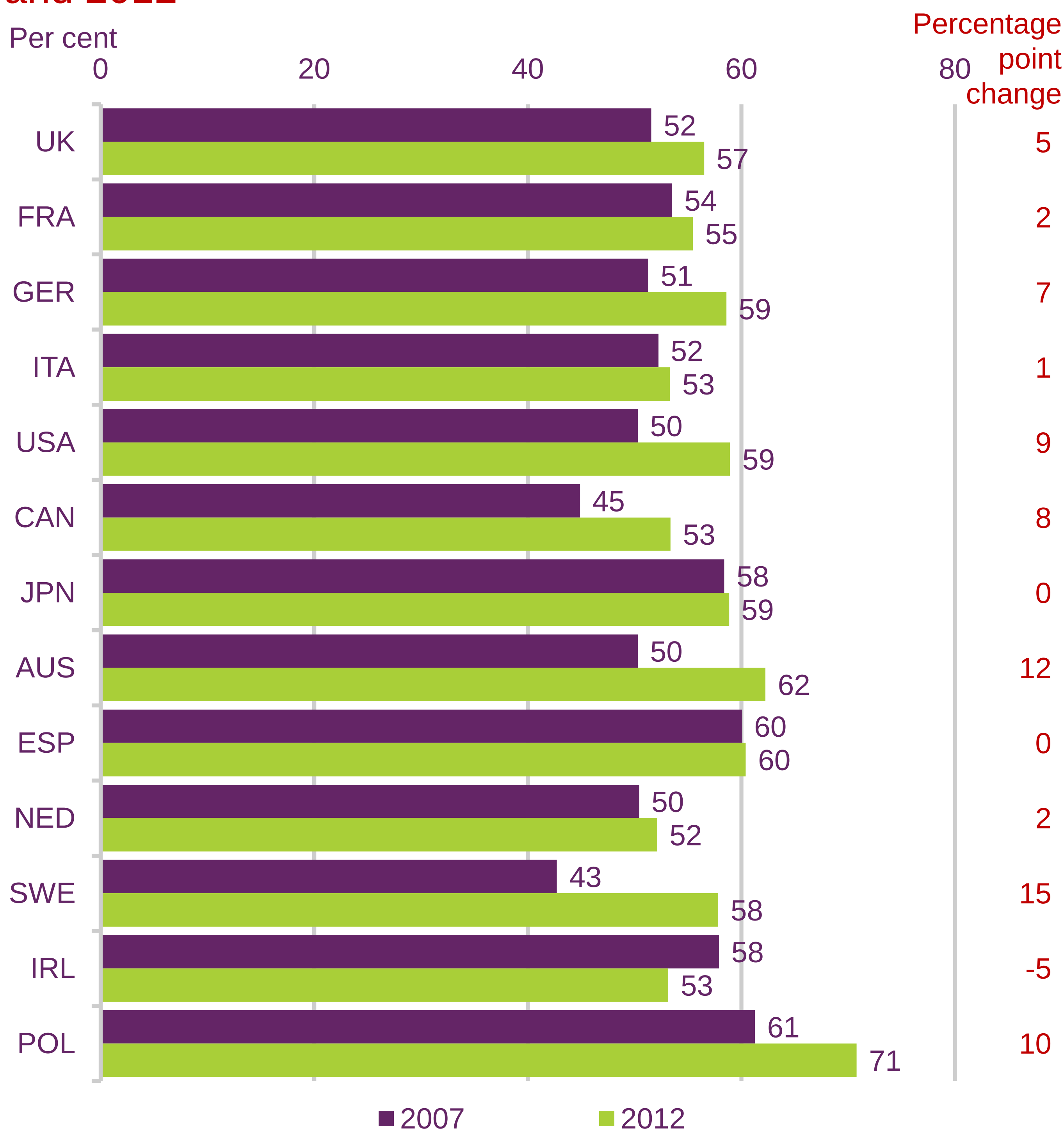


Source: IDATE / industry data / Ofcom

Note: Figures for the BRIC countries exclude fixed broadband revenues

Figure 6.15

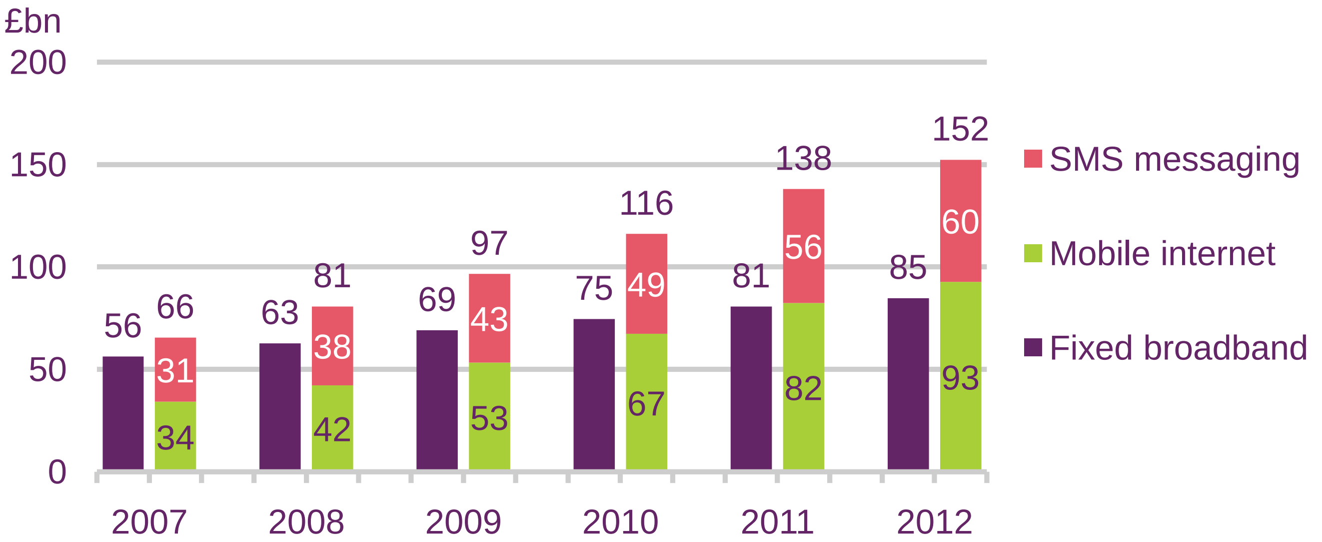
Mobile as a proportion of total telecoms revenues: 2007 and 2012



Source: IDATE / industry data / Ofcom

Figure 6.16

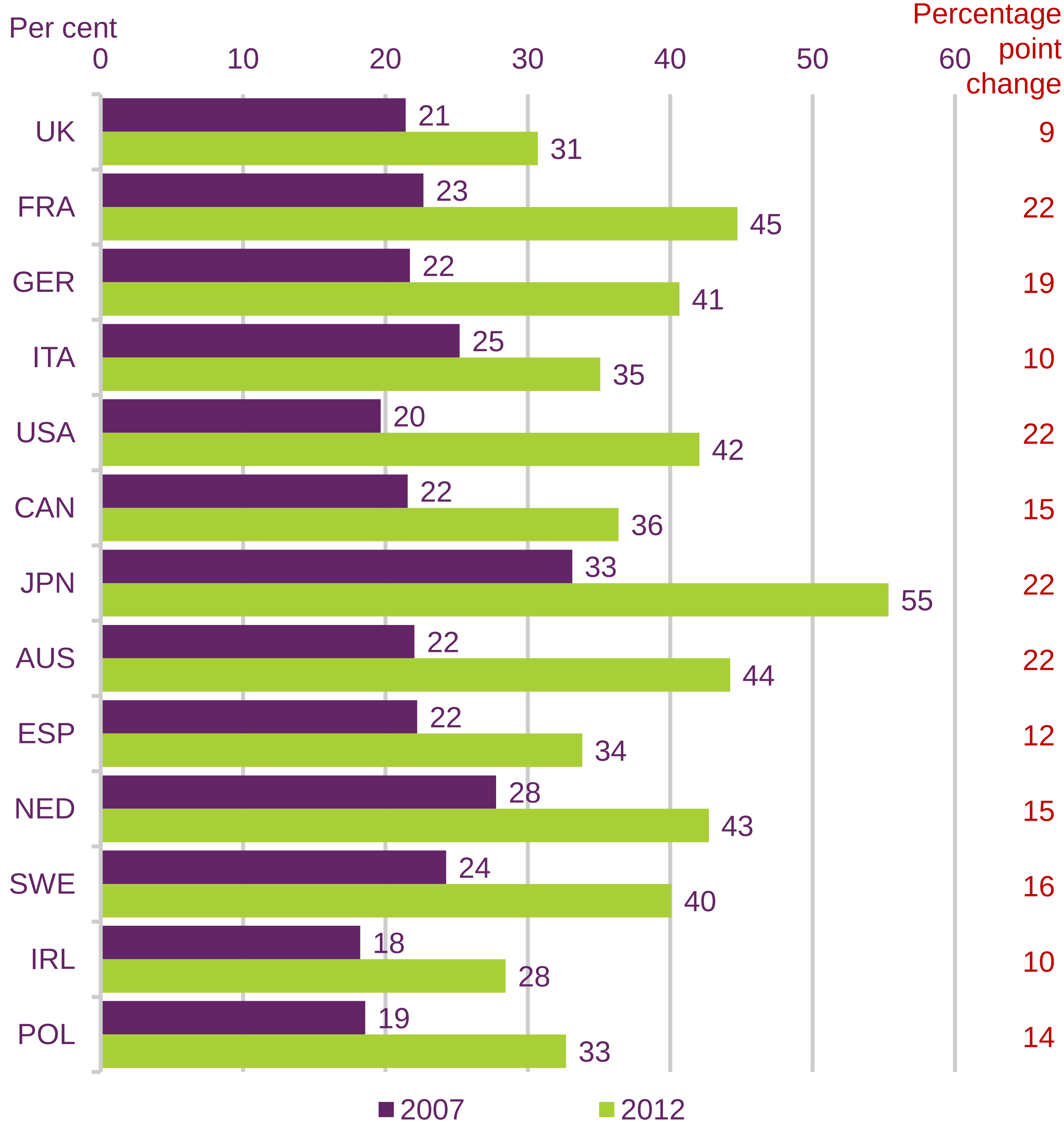
Total fixed broadband and mobile data revenues: 2007 to 2012



Source: IDATE / industry data / Ofcom
Note: Excludes the BRIC countries

Figure 6.17

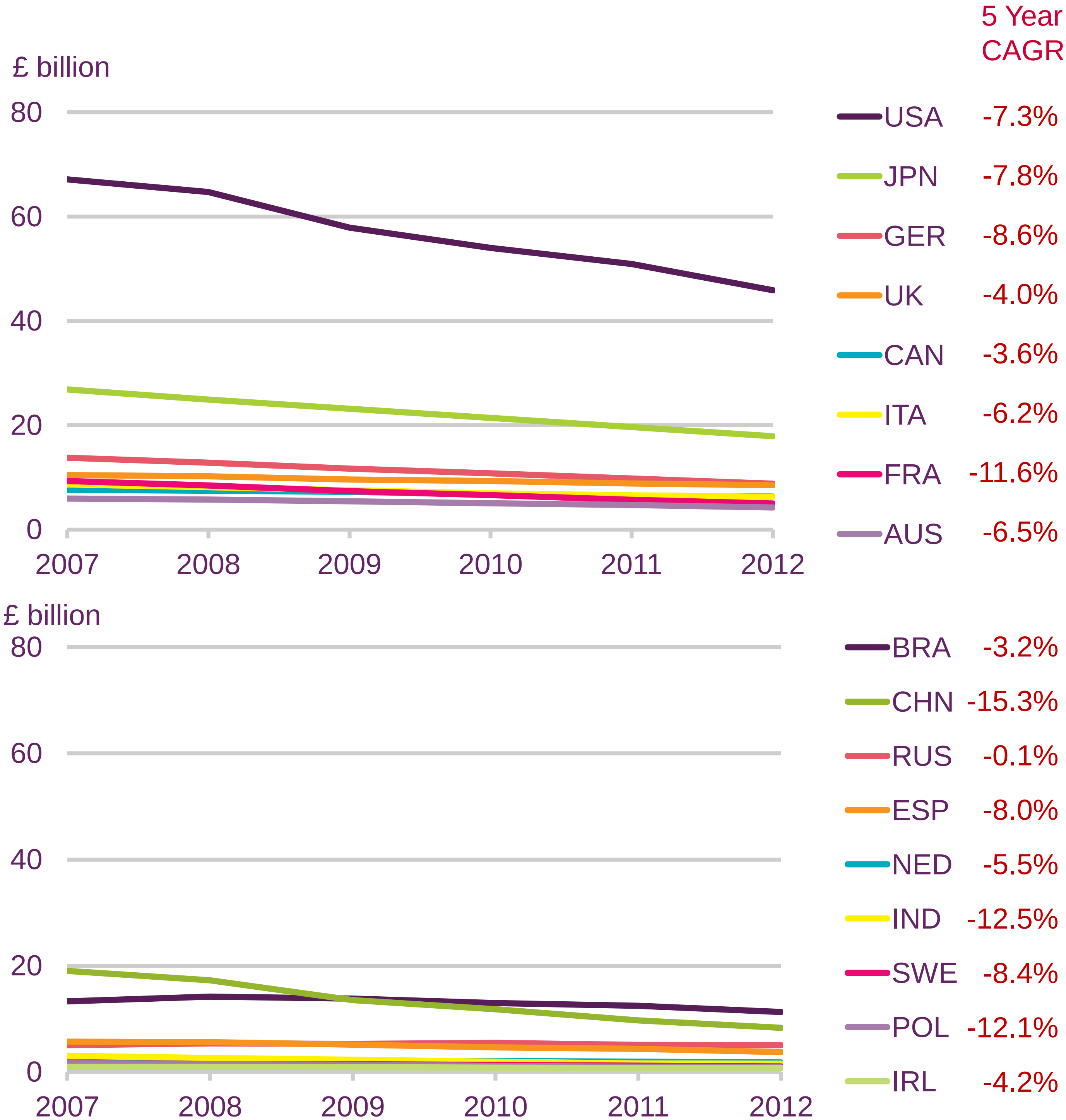
Data revenue as a proportion of total telecoms revenue: 2007 and 2012



Source: IDATE / industry data / Ofcom

Figure 6.18

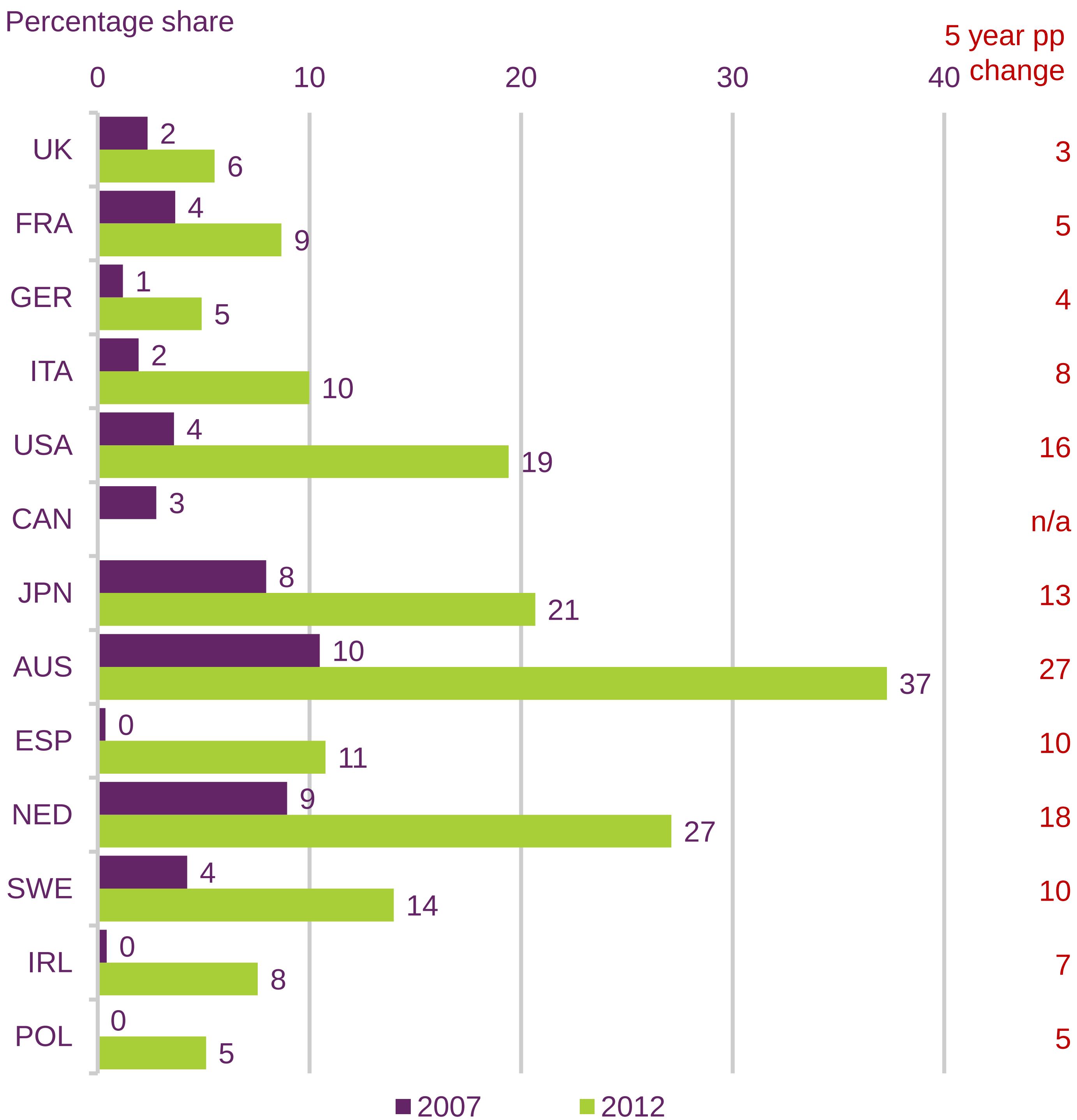
Fixed line voice retail revenues: 2007 to 2012



Source: IDATE / industry data / Ofcom

Figure 6.19

VoIP revenues as a proportion of fixed voice revenues: 2007 and 2012

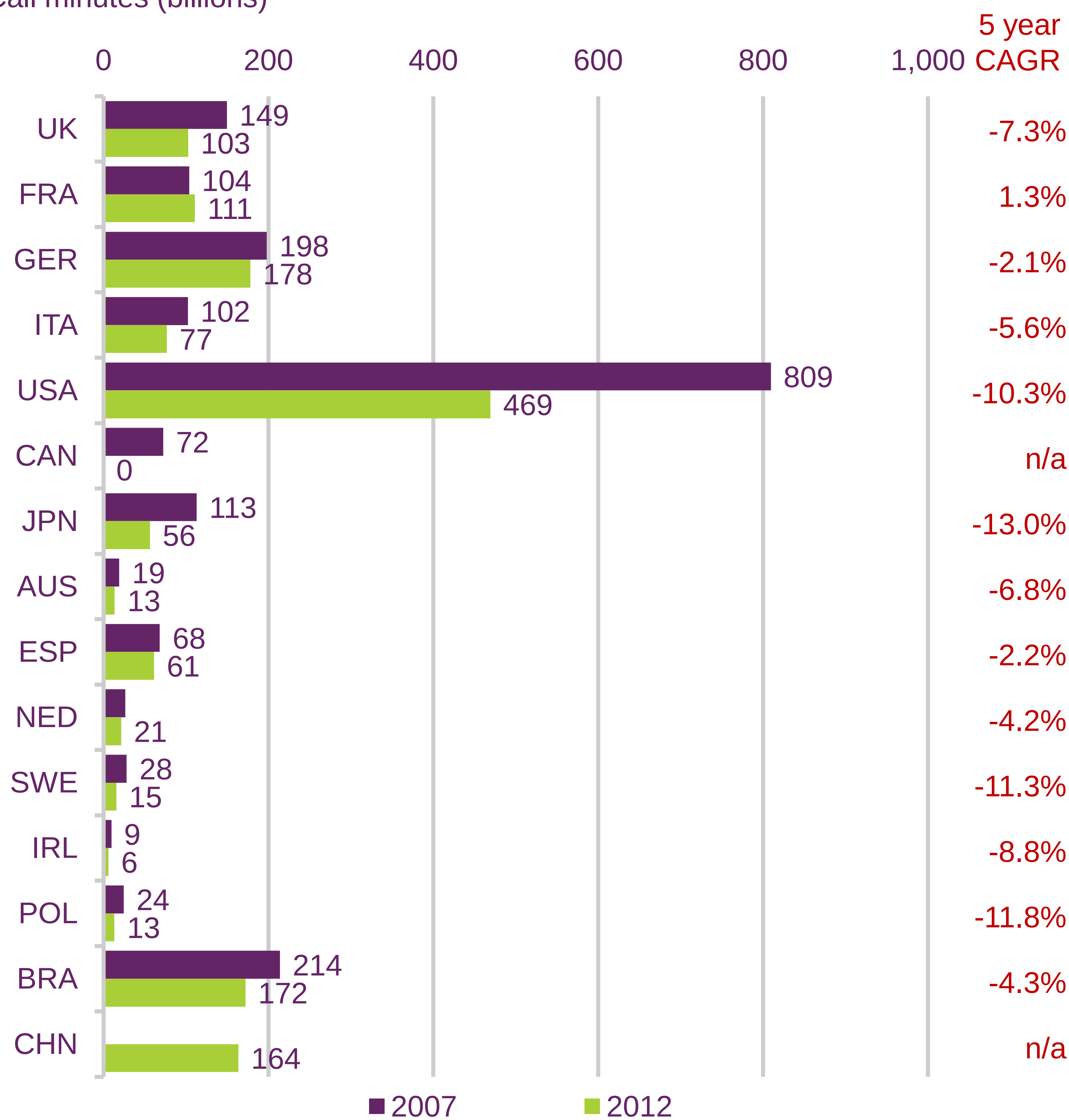


Source: IDATE

Figure 6.20

Fixed line voice call volumes: 2007 and 2012

Call minutes (billions)

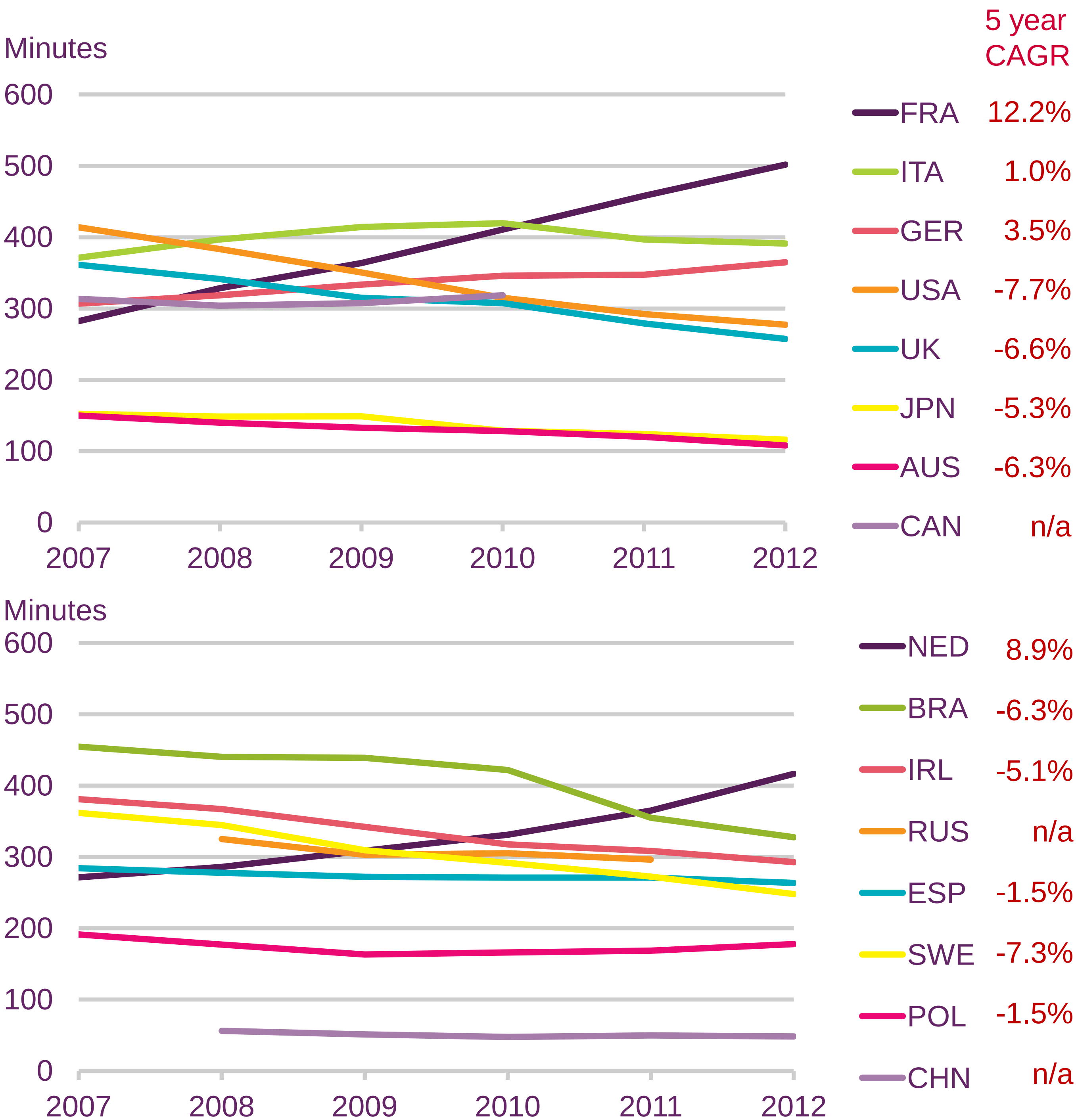


Source: IDATE / industry data / Ofcom

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

Figure 6.21

Monthly outbound minutes per fixed line: 2007 to 2012

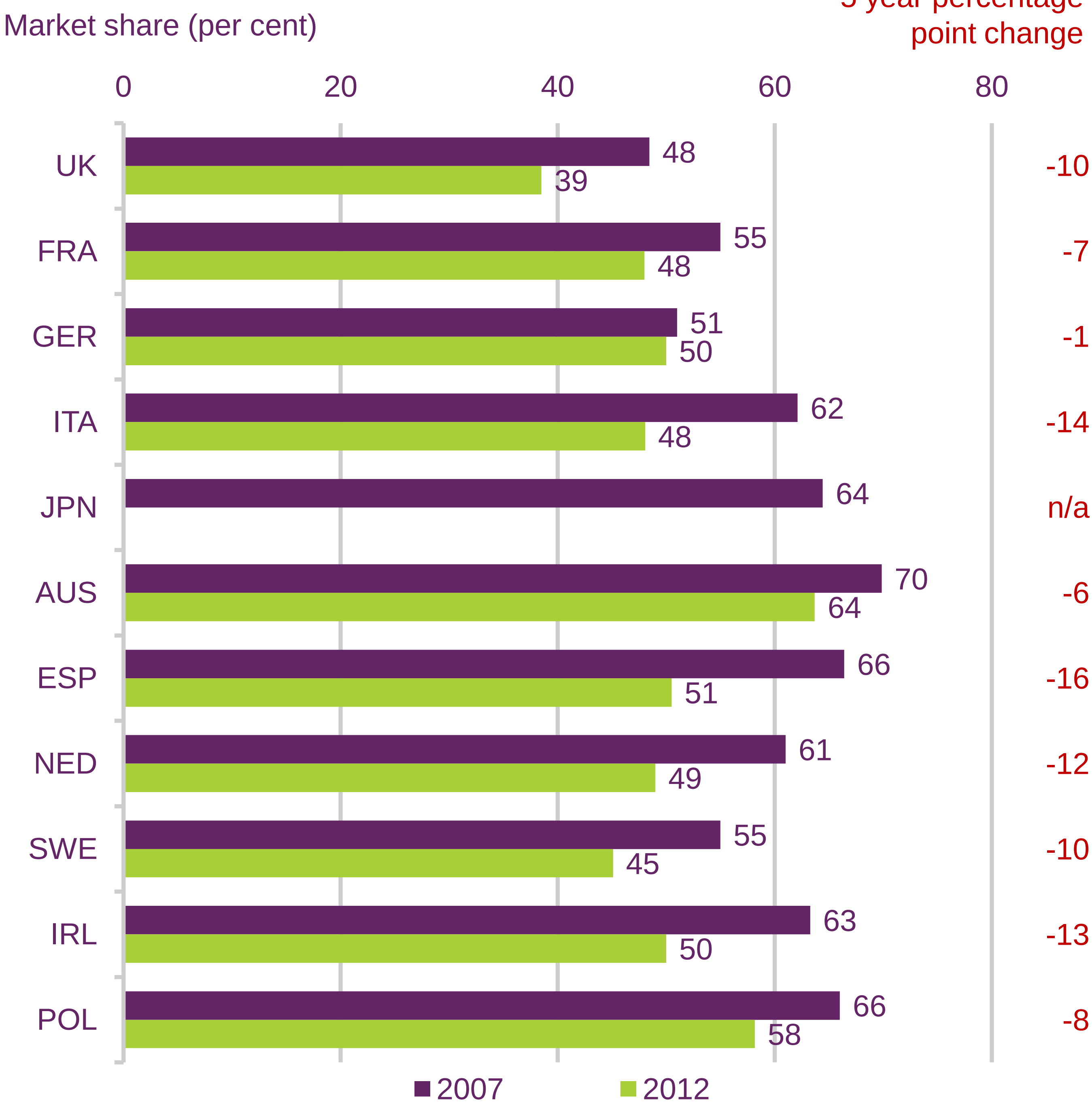


Source: IDATE / industry data / Ofcom

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

Figure 6.22

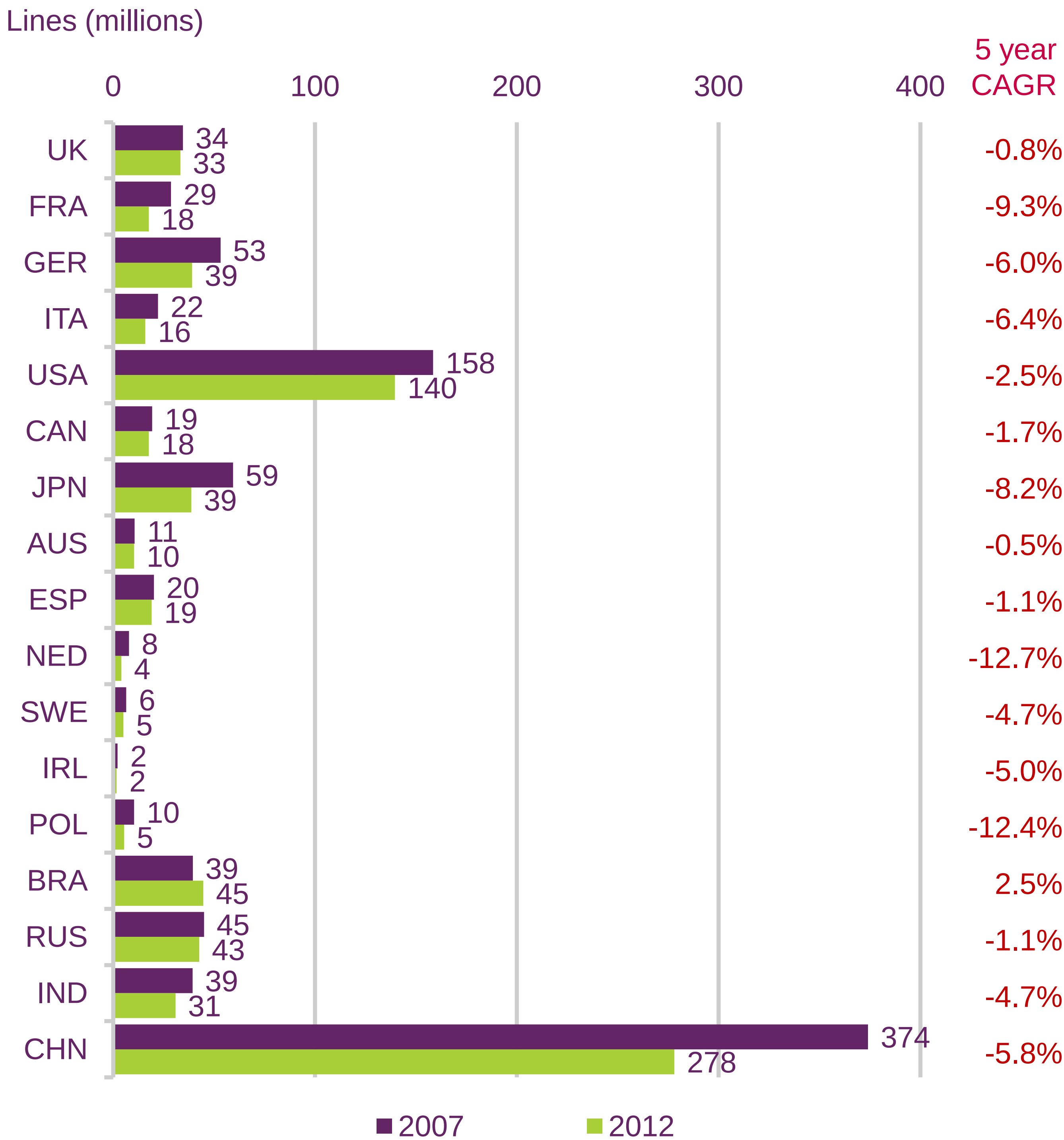
Incumbent operator's share of fixed voice call volumes: 2007 and 2012



Source: IDATE / industry data / Ofcom

Figure 6.23

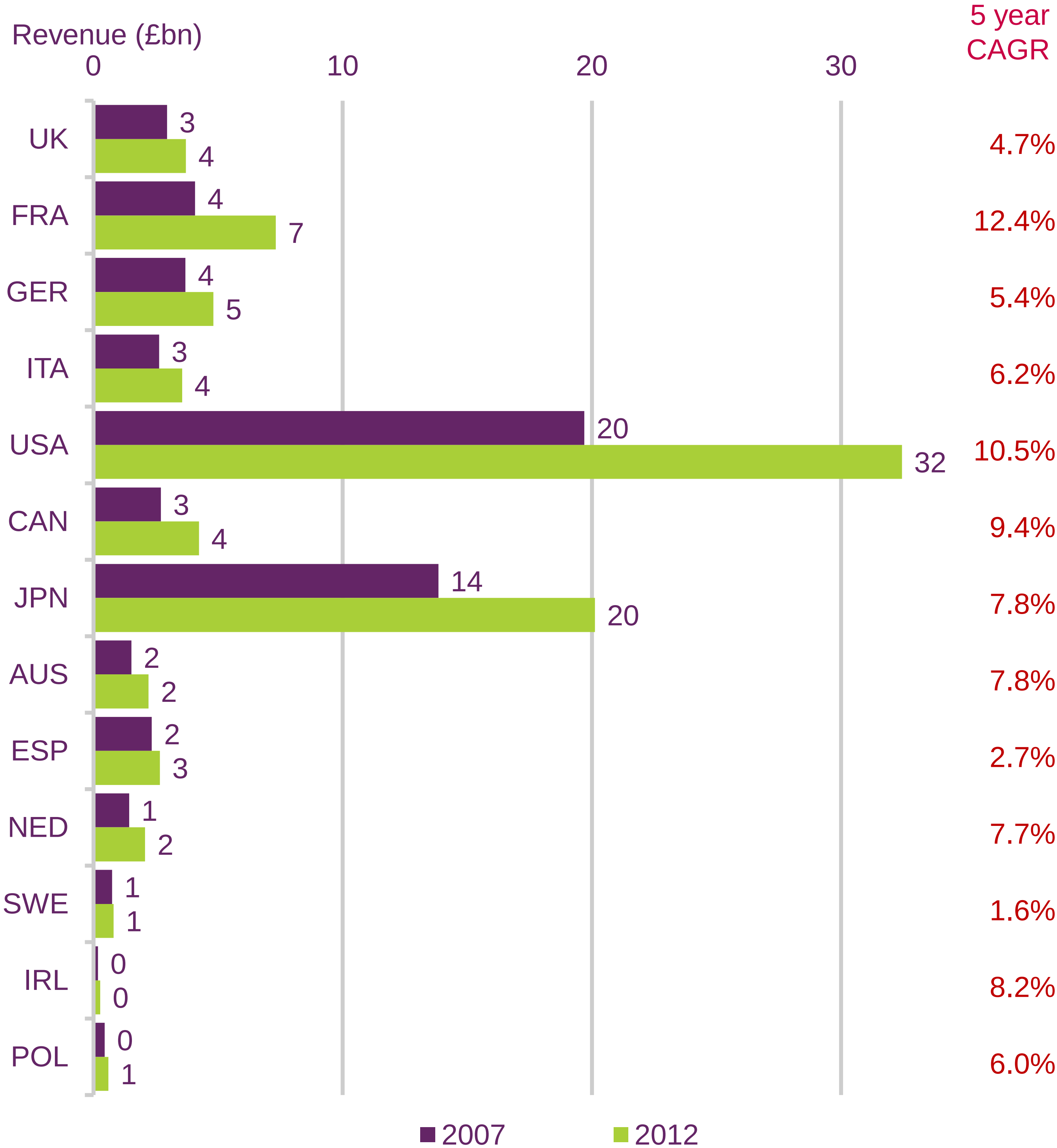
Fixed exchange lines: 2007 and 2012



Source: IDATE / industry data / Ofcom

Figure 6.24

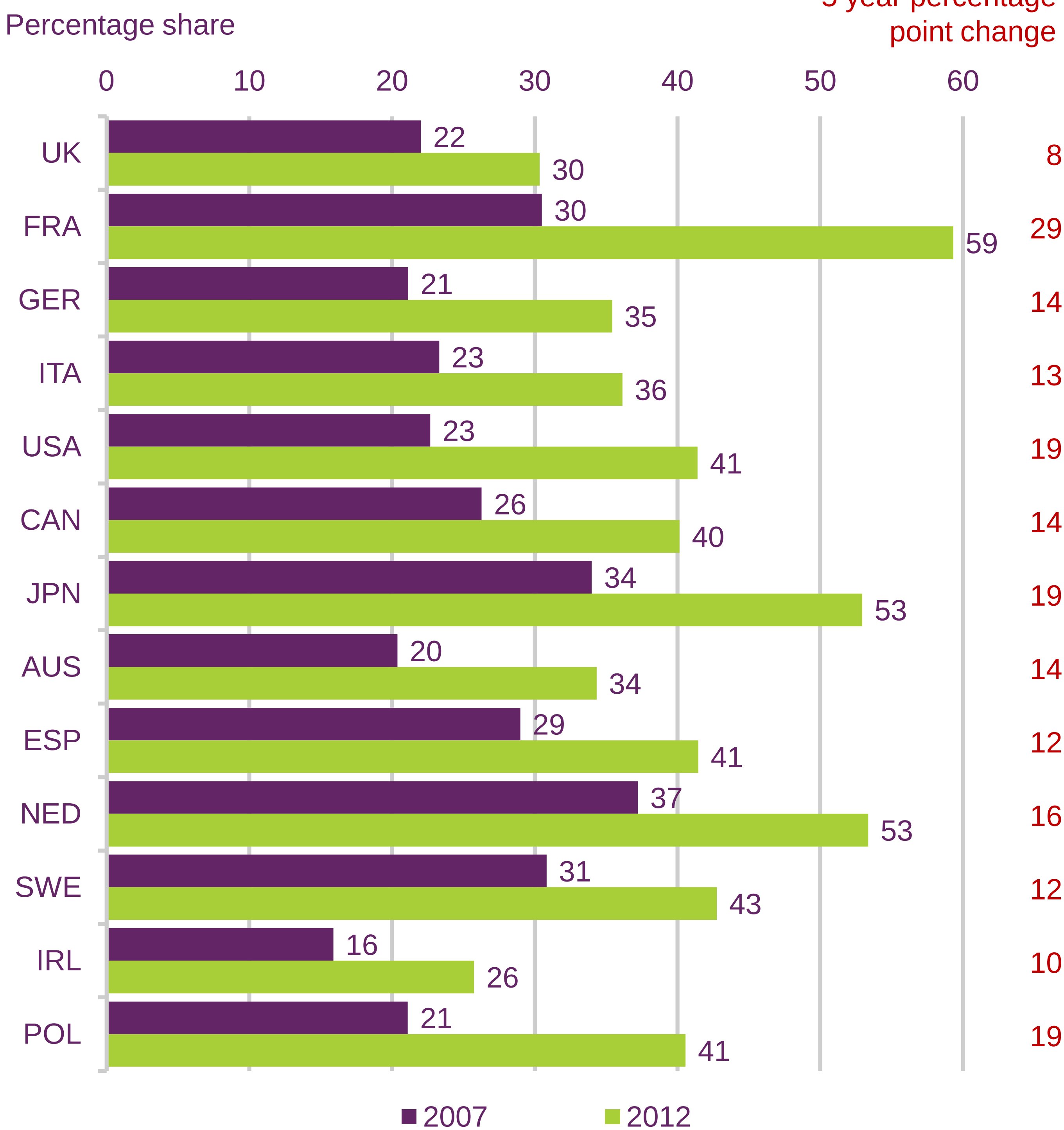
Fixed broadband revenues: 2007 and 2012



Source: IDATE / industry data / Ofcom

Figure 6.25

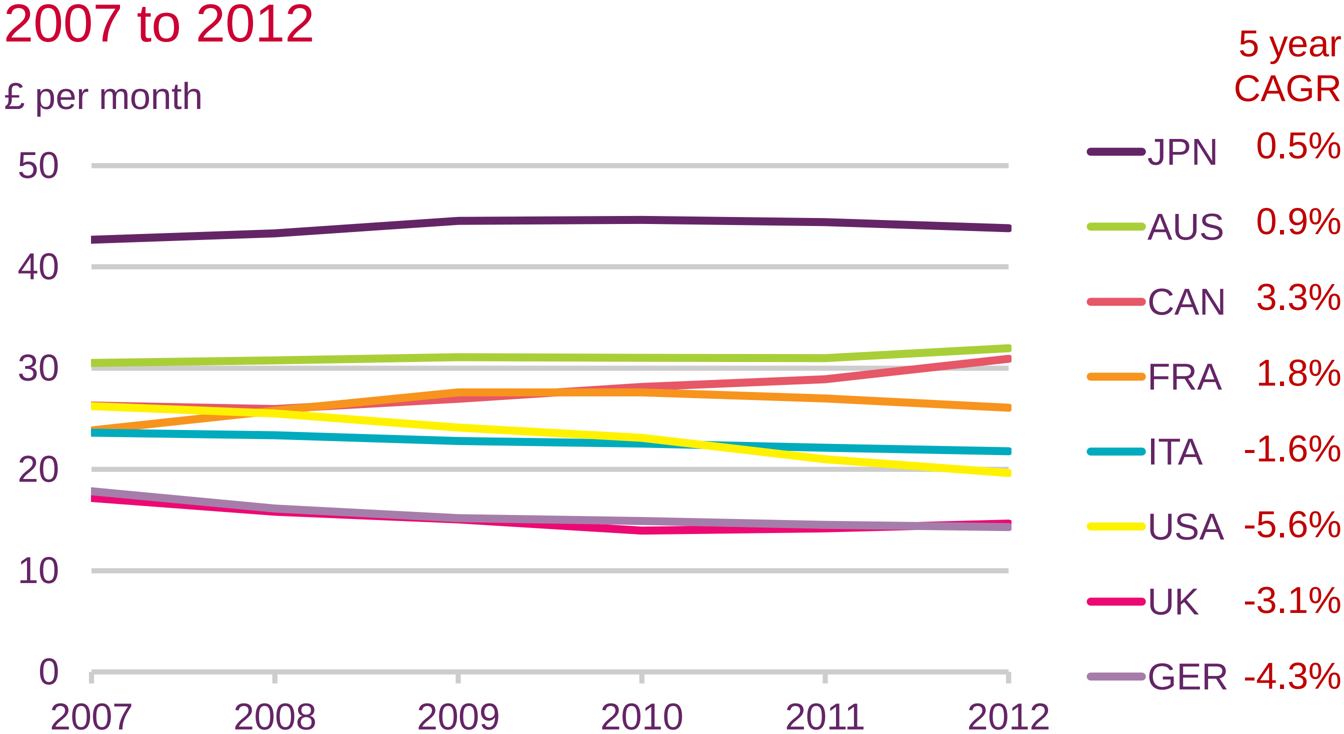
Fixed broadband as a proportion of total fixed revenues: 2007 to 2012

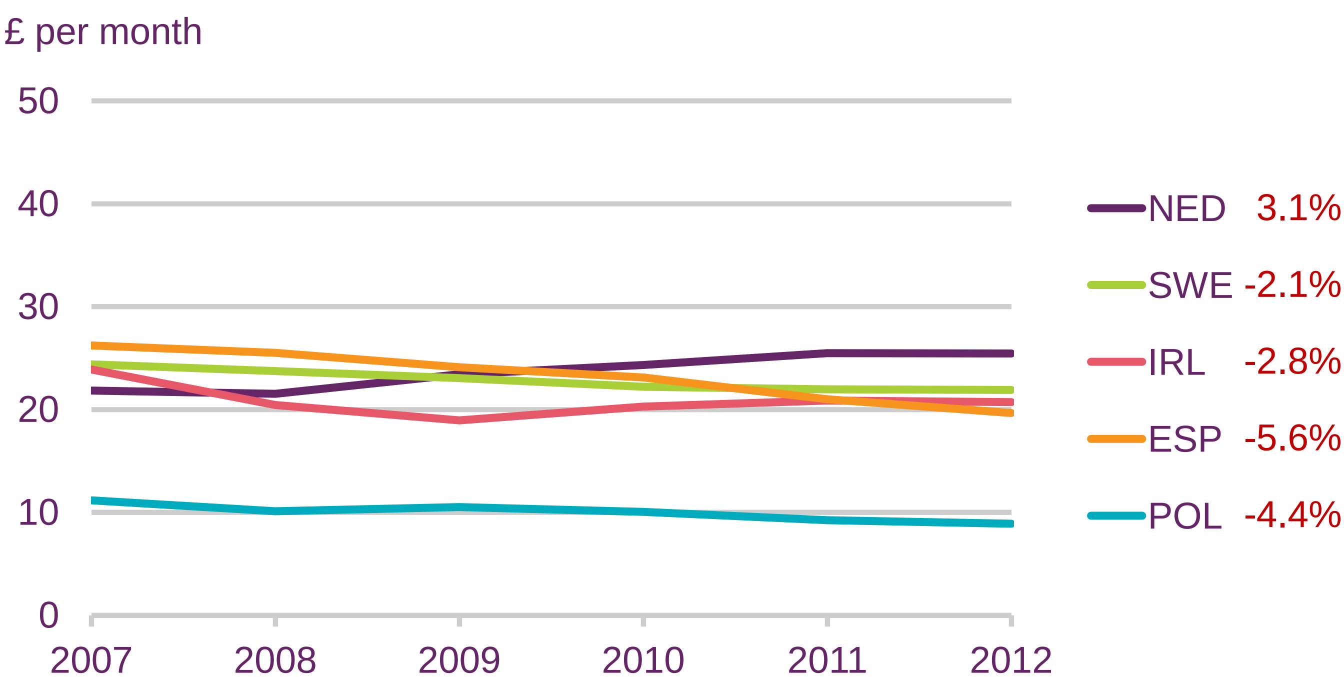


Source: IDATE / industry data / Ofcom

Figure 6.26

Retail fixed broadband average revenue per connection: 2007 to 2012

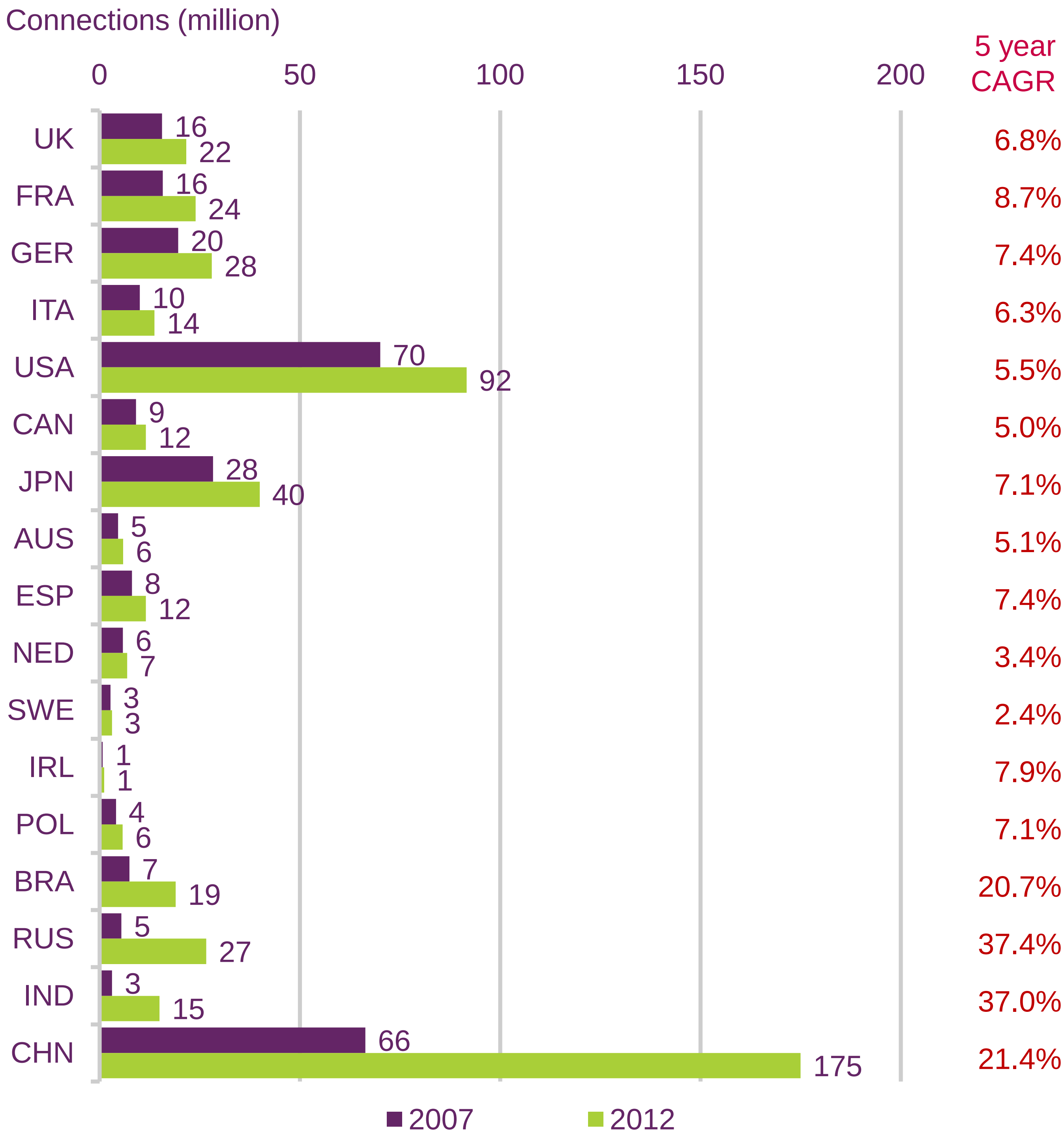




Source: IDATE / industry data / Ofcom

Figure 6.27

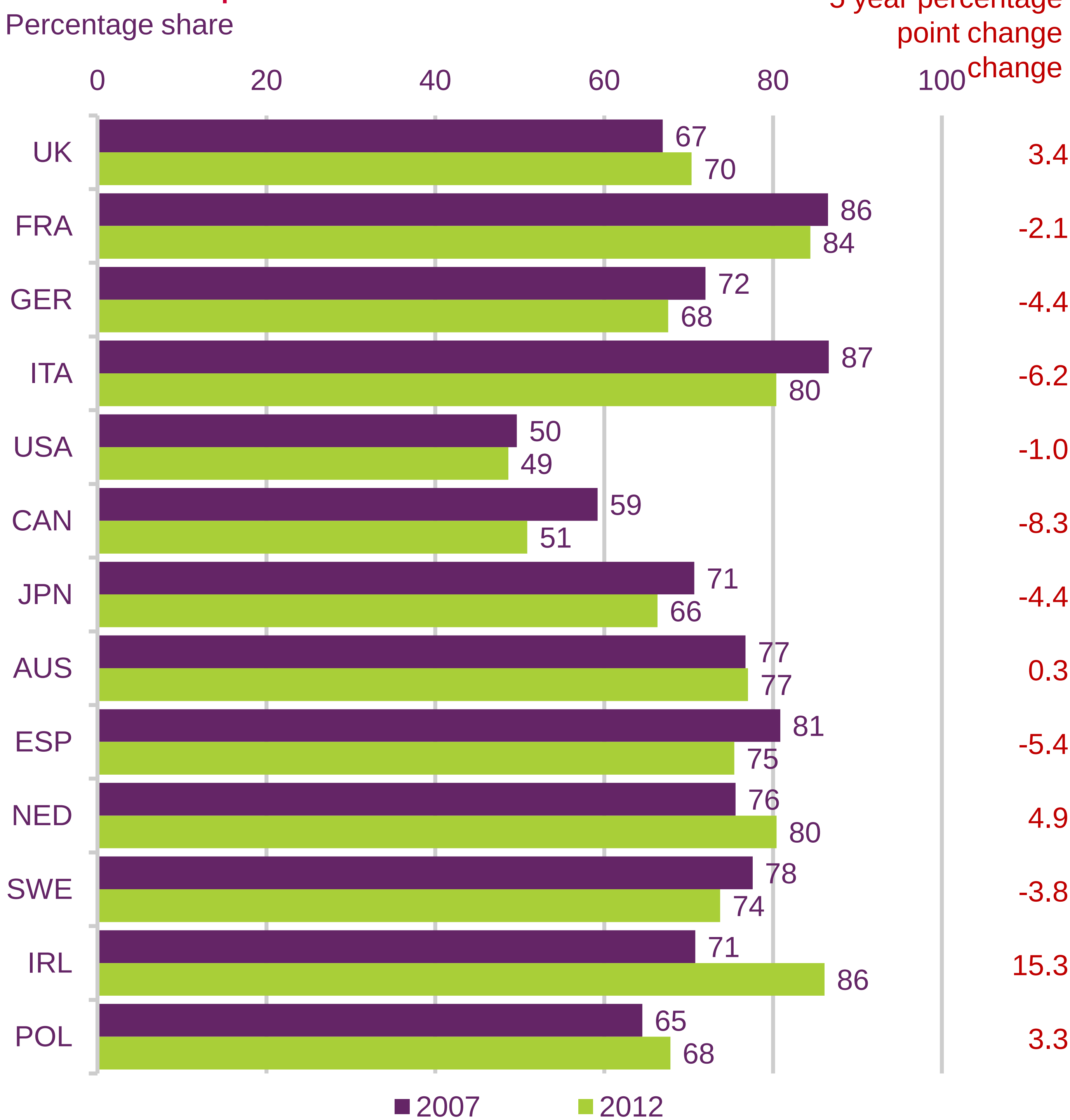
Fixed broadband connections: 2007 to 2012



Source: IDATE / industry data / Ofcom

Figure 6.28

Retail connection share of the three largest fixed broadband providers: 2007 to 2012



Source: IDATE / industry data / Ofcom

Figure 6.29

Total comparator country retail mobile telecoms revenue, by country type: 2007 to 2012

Source: IDATE / industry data / Ofcom

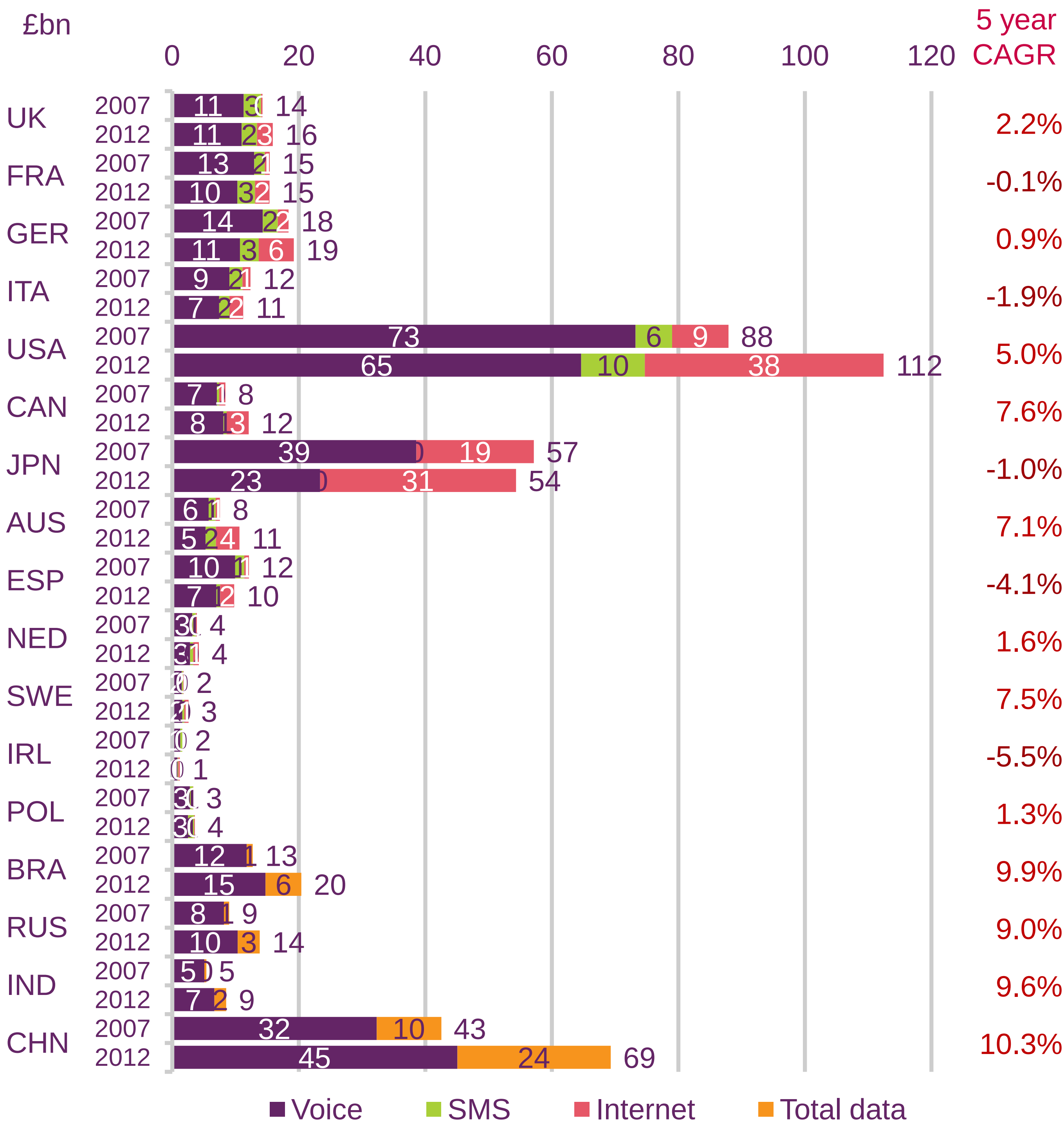
Figure 6.30

Total comparator country retail mobile telecoms revenue, by sector: 2007 to 2012

Source: IDATE / industry data / Ofcom

Figure 6.31

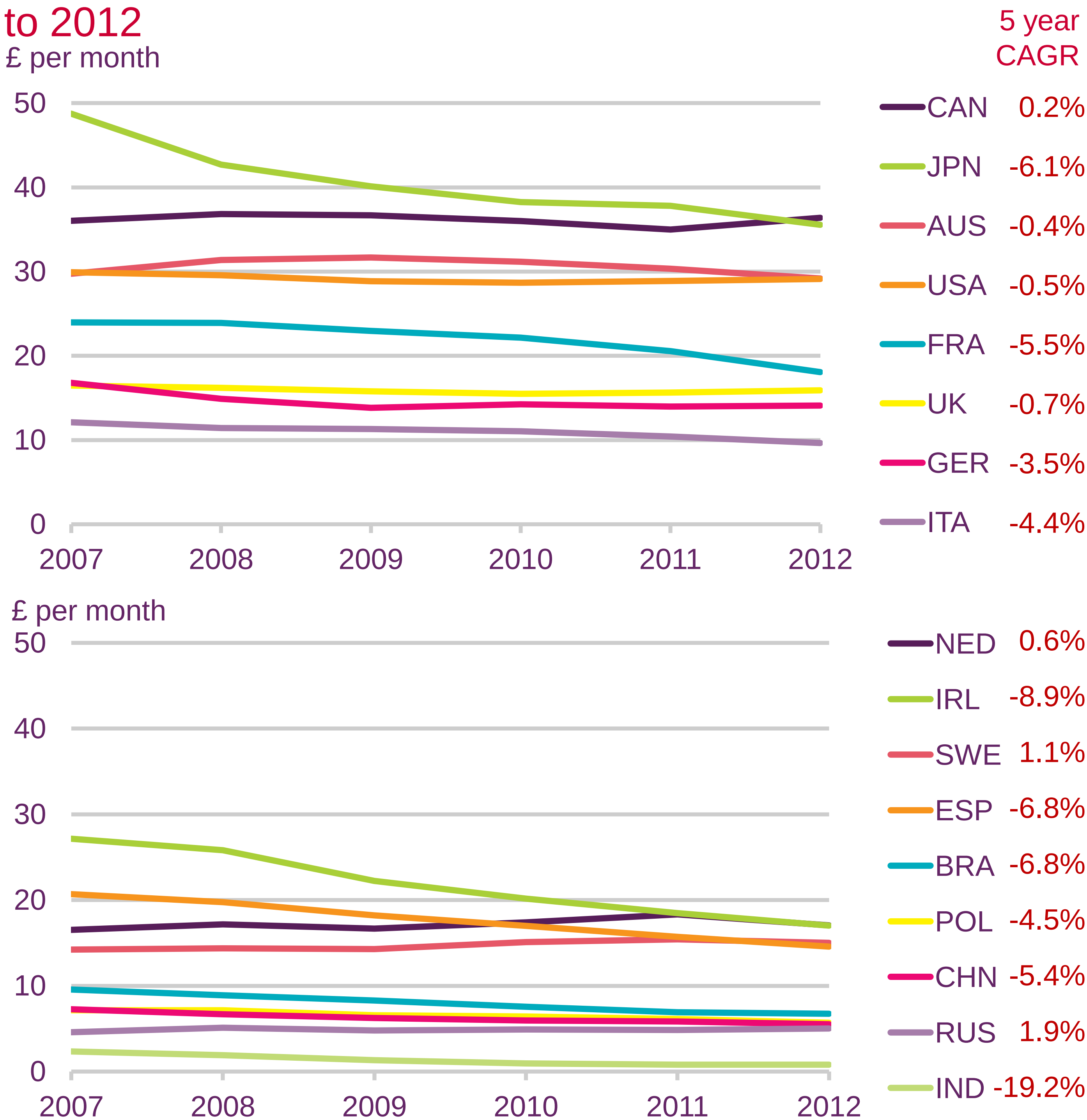
Retail mobile revenues, by service and country: 2007 and 2012



Source: IDATE / industry data / Ofcom

Figure 6.32

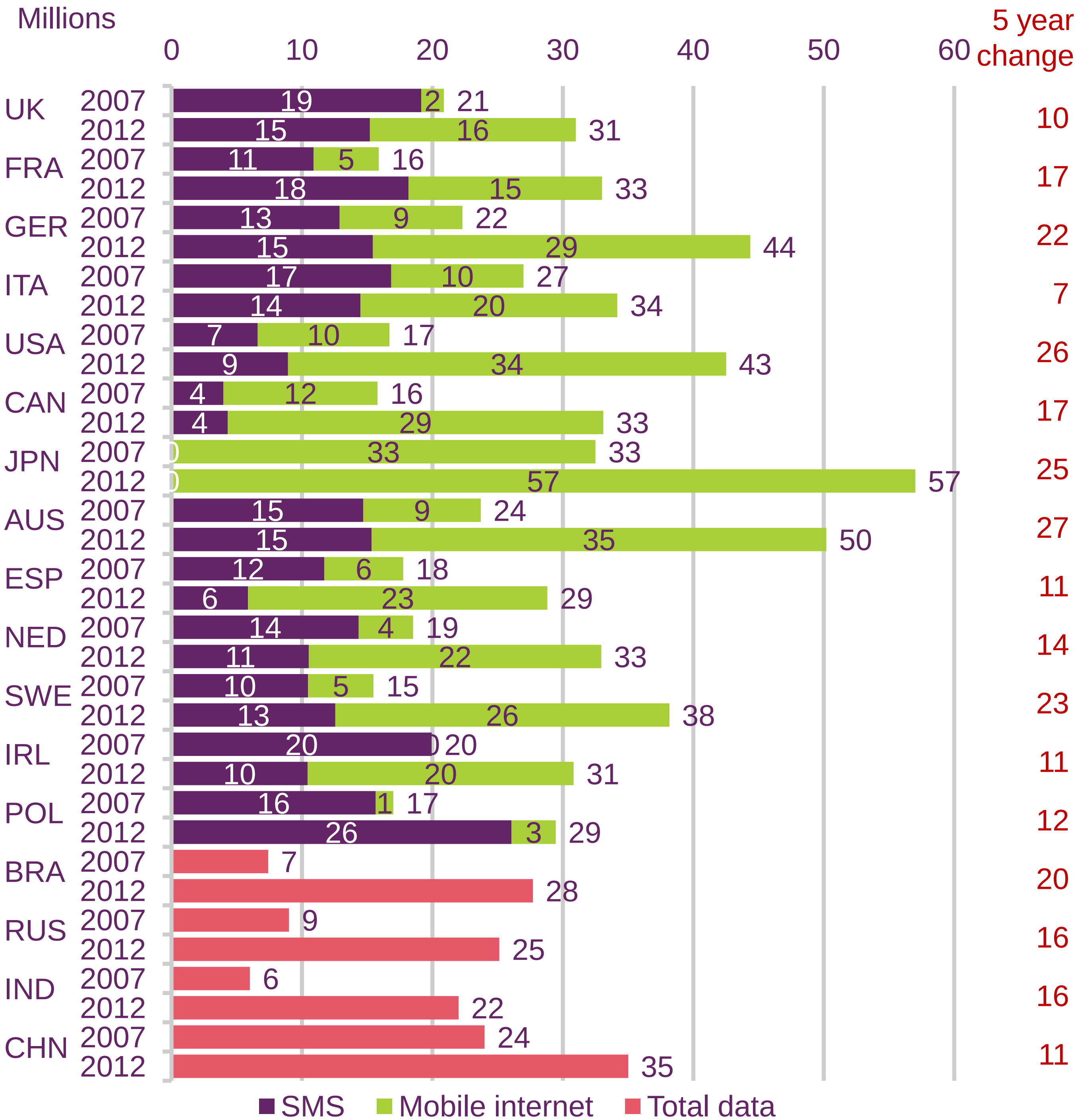
Average monthly revenue per mobile connection: 2007 to 2012



Source: IDATE / industry data / Ofcom

Figure 6.33

Data as a proportion of total mobile service revenues: 2007 and 2012

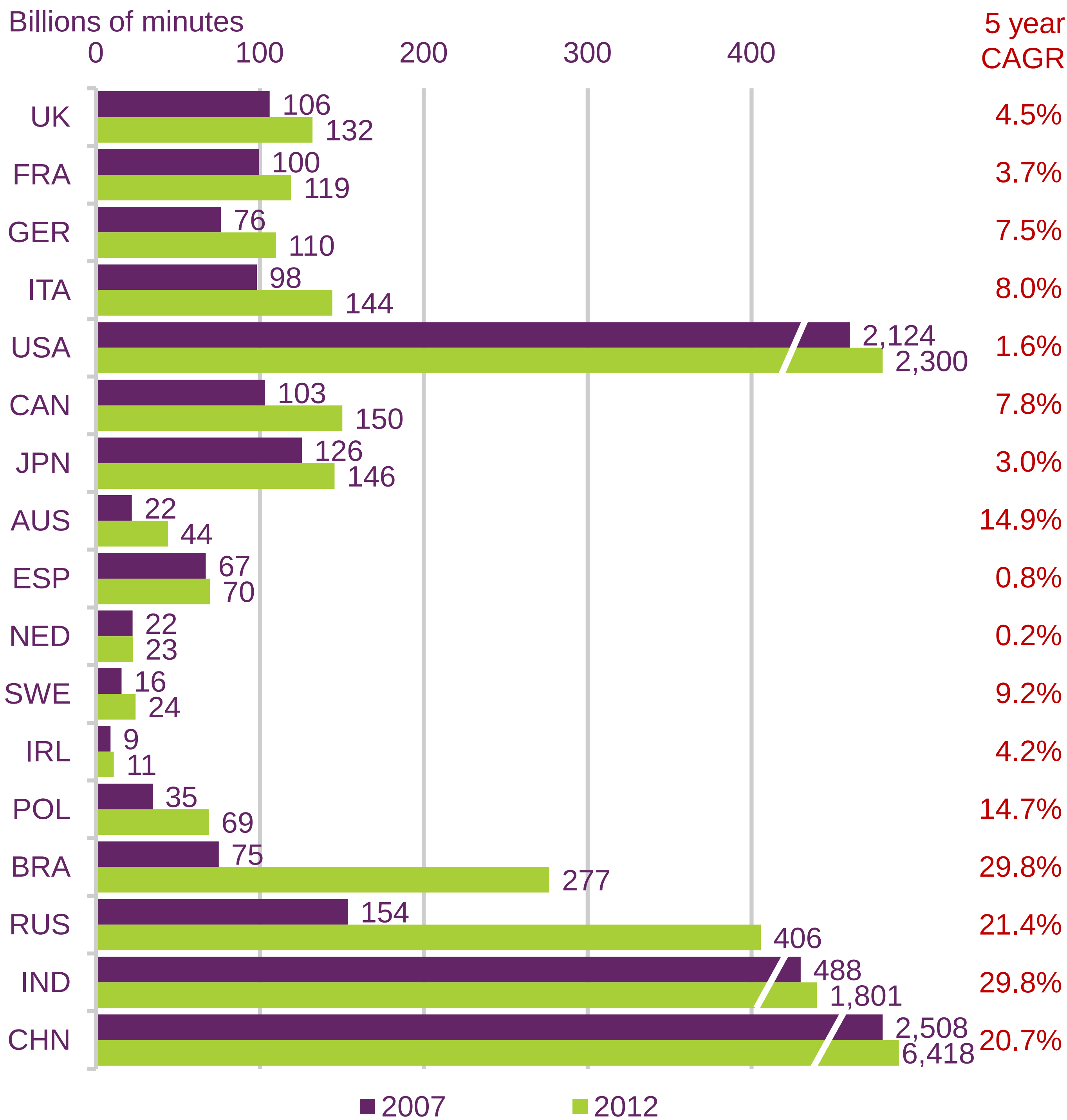


Source: IDATE / industry data / Ofcom

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

Figure 6.34

Mobile voice call volumes: 2007 and 2012

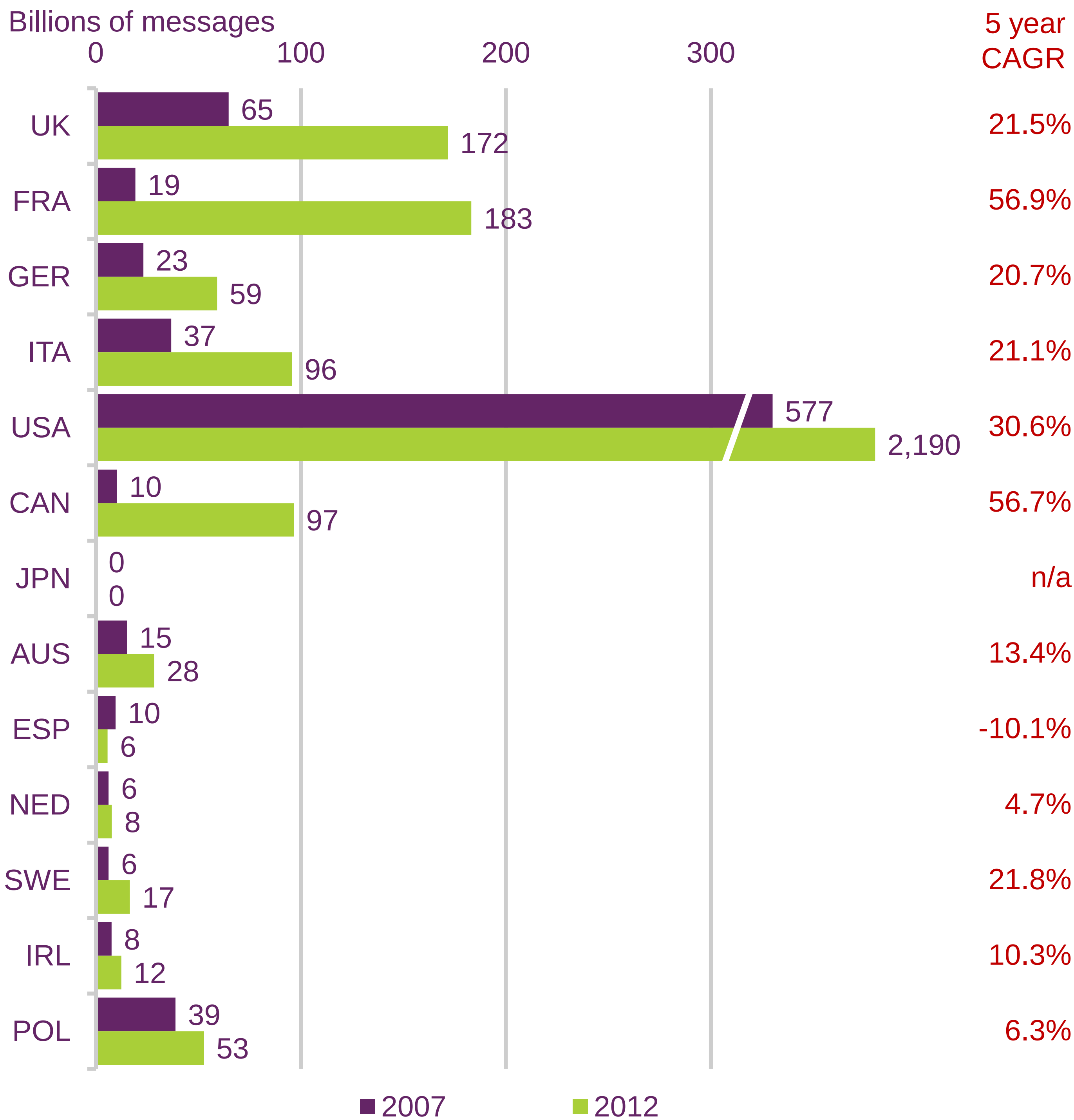


Source: IDATE / industry data / Ofcom

Note: Figures for USA, CAN and CHN include incoming calls

Figure 6.35

Mobile messaging volumes: 2007 and 2012

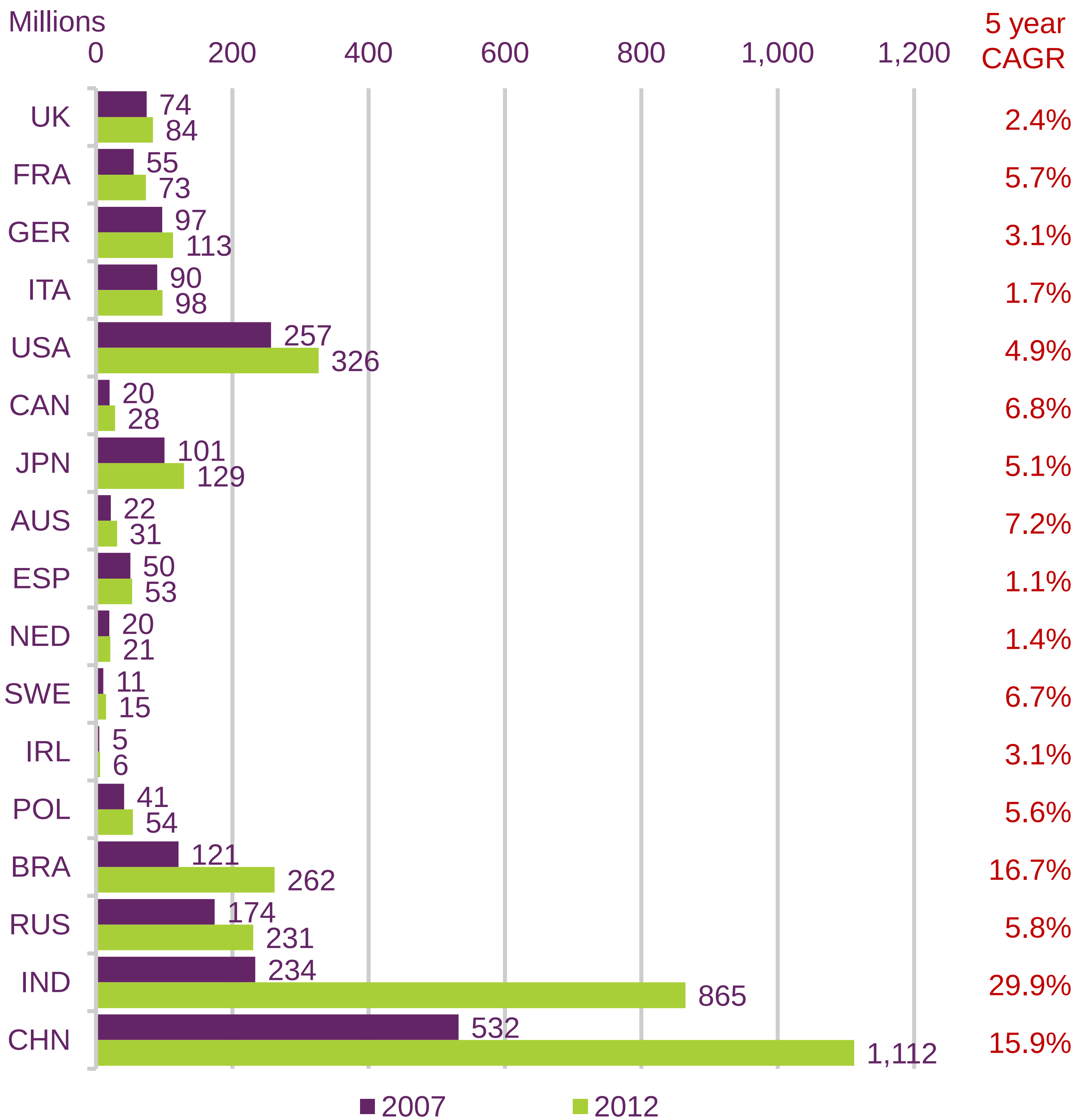


Source: IDATE / industry data / Ofcom

Note: Includes SMS and MMS messages. MMS messaging volume figures were not available for Italy, Australia and the Netherlands. Figures for the US include other forms of mobile text messaging than SMS and are not directly comparable to those for the other comparator countries.

Figure 6.36

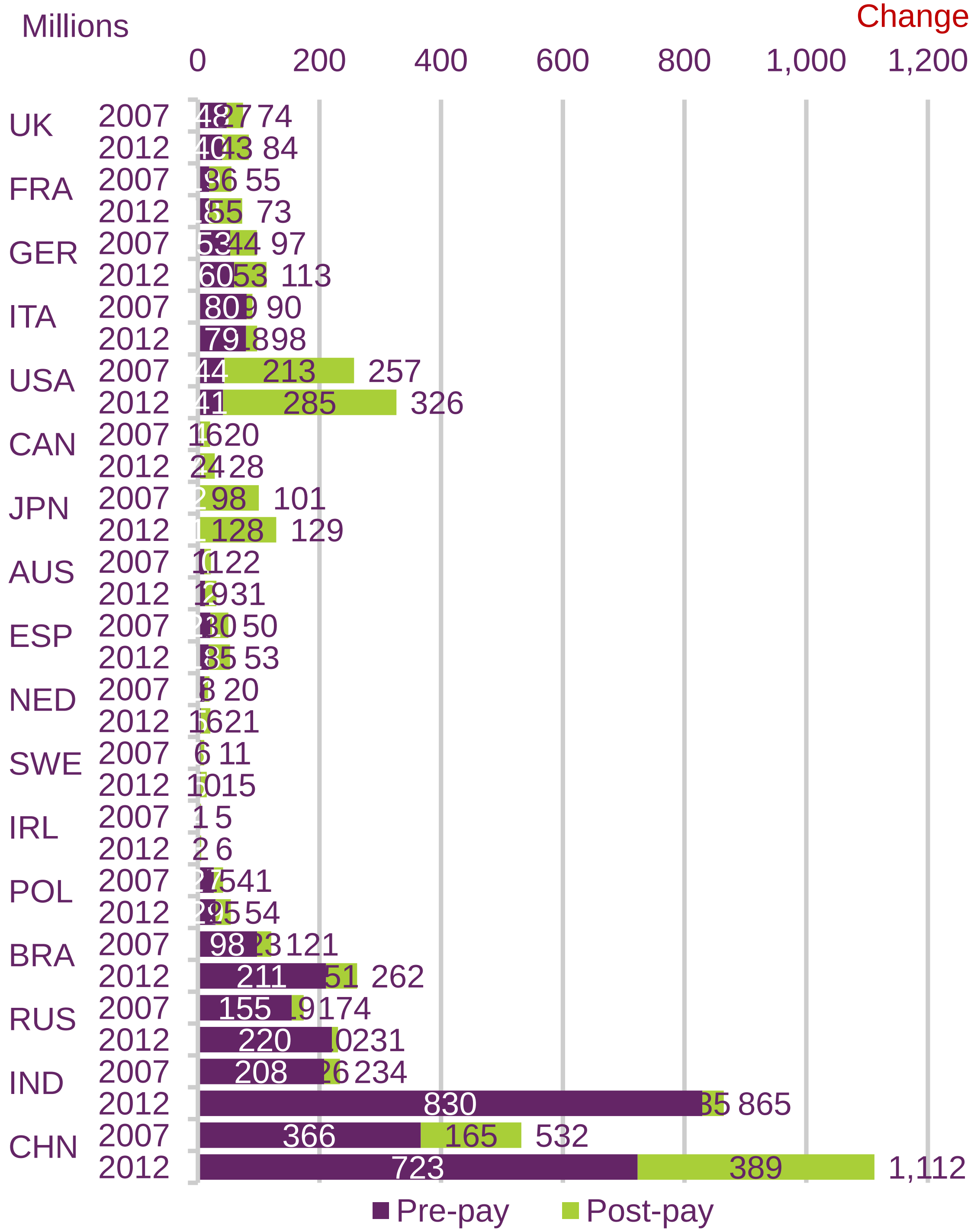
Mobile connections: 2007 and 2012



Source: IDATE / industry data / Ofcom

Figure 6.37

Mobile connections, by type: 2007 and 2012

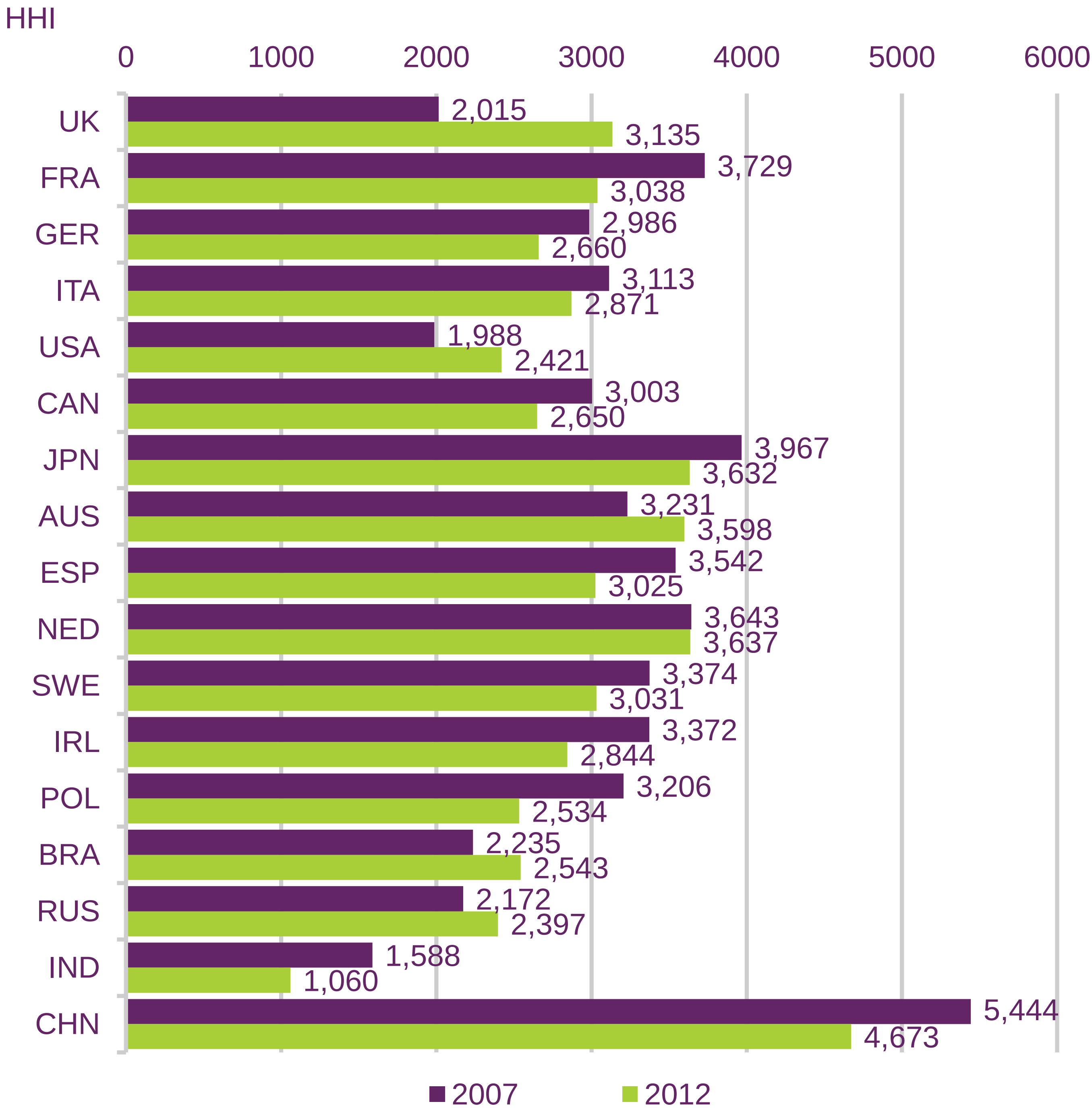


	Change in % post-pay	
	1 year	5 year
UK	3.8	15.7
FRA	3.6	9.4
GER	3.0	2.0
ITA	1.6	8.1
USA	2.3	4.3
CAN	7.1	8.1
JPN	-0.2	1.2
AUS	-0.1	9.5
ESP	1.1	7.7
NED	20.3	33.0
SWE	2.7	12.4
IRL	3.2	15.8
POL	-1.6	10.3
BRA	1.3	0.1
RUS	0.0	-6.8
IND	0.6	-7.0
CHN	1.5	3.9

Source: IDATE / industry data / Ofcom

Figure 6.38

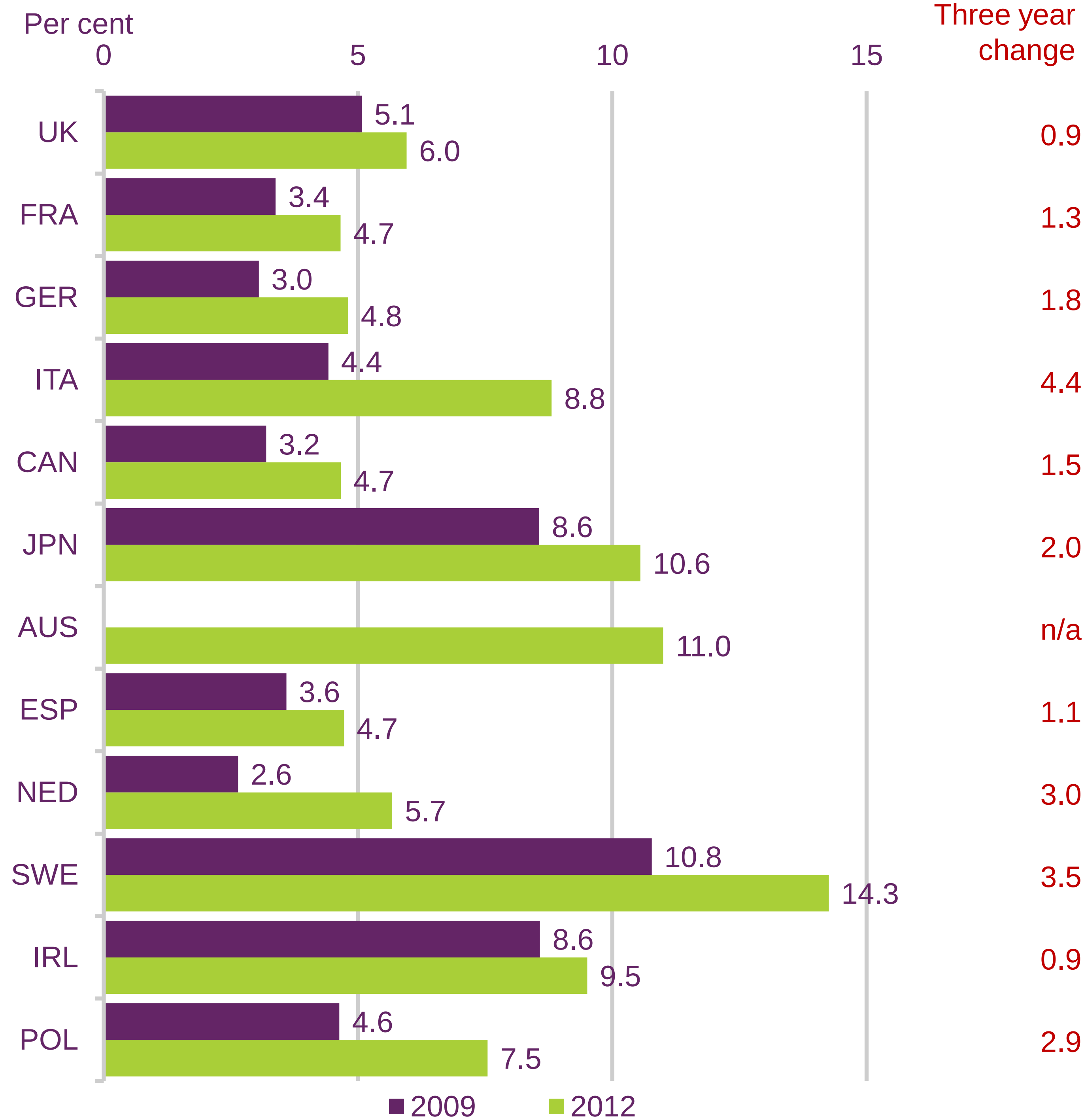
Herfindahl-Hirschman index of mobile concentration: 2007 and 2012



Source: IDATE

Figure 6.39

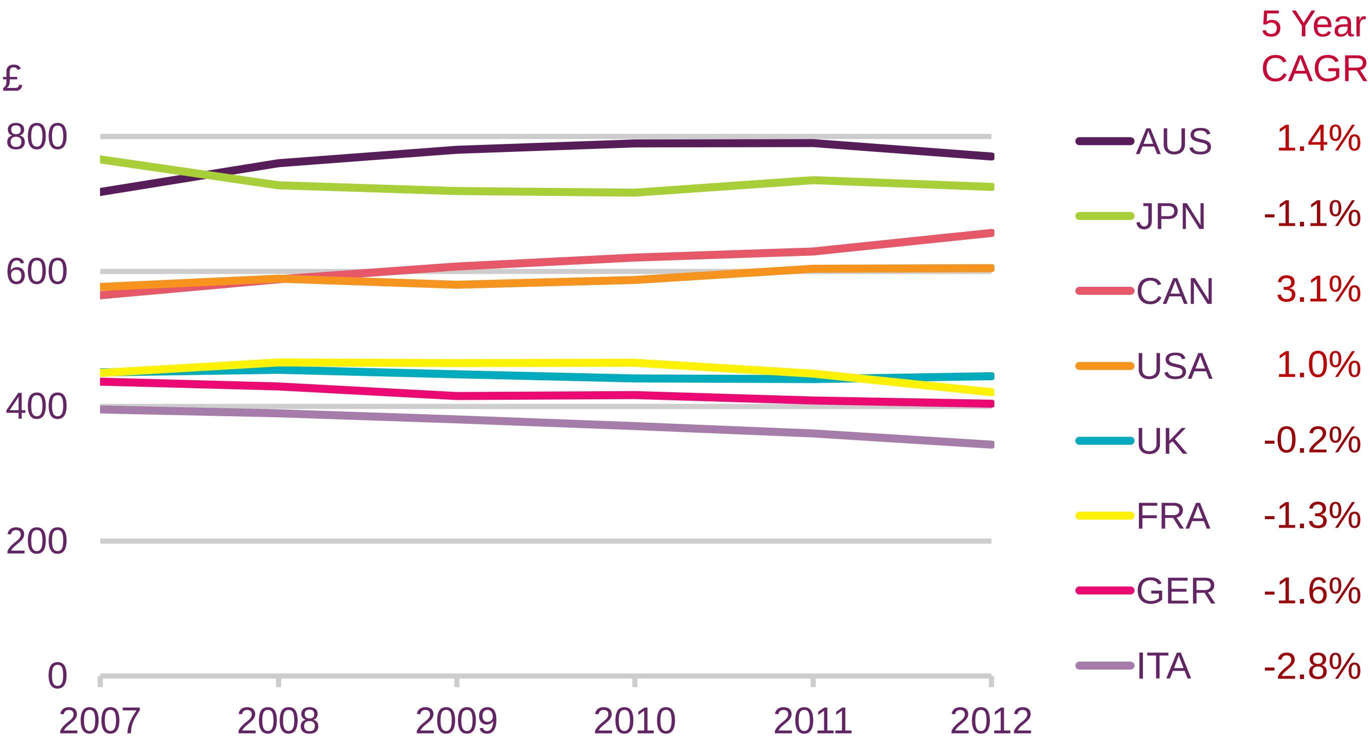
Mobile broadband as a proportion of total mobile connections: 2009 and 2012

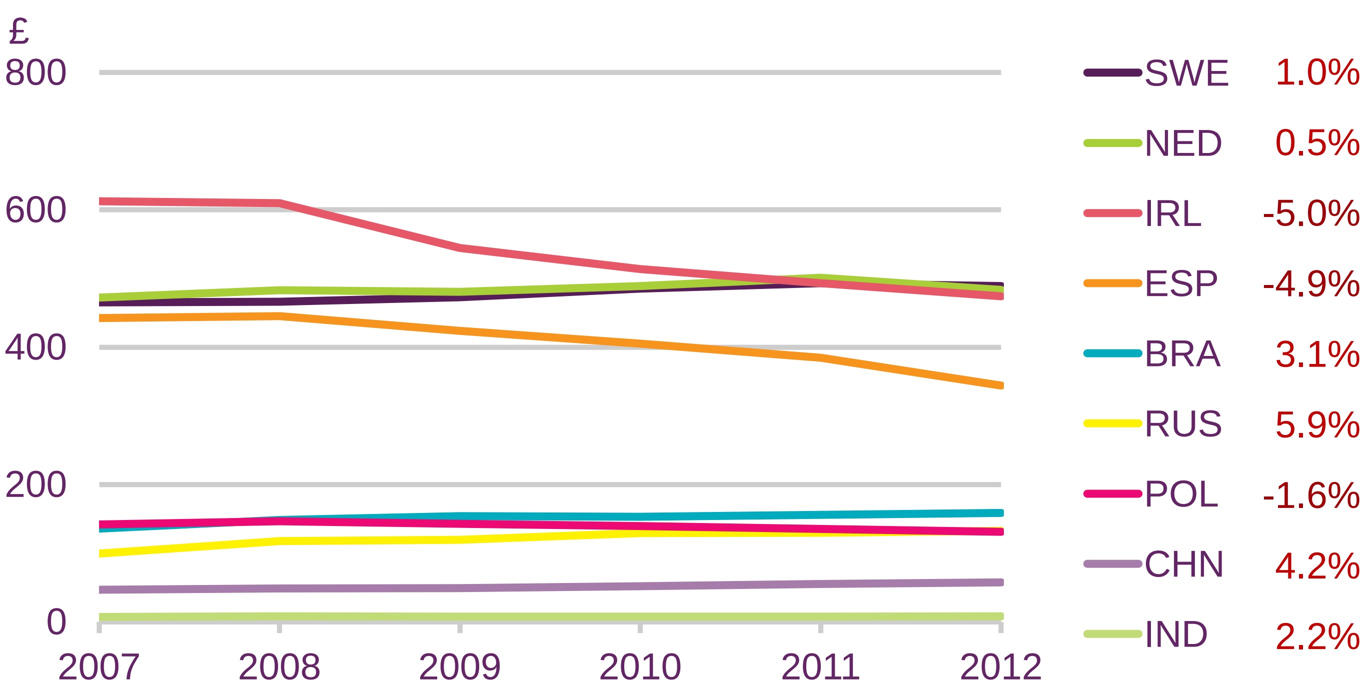


Source: IDATE / industry data / Ofcom

Figure 6.40

Total per-capita telecoms service revenue: 2007 to 2012



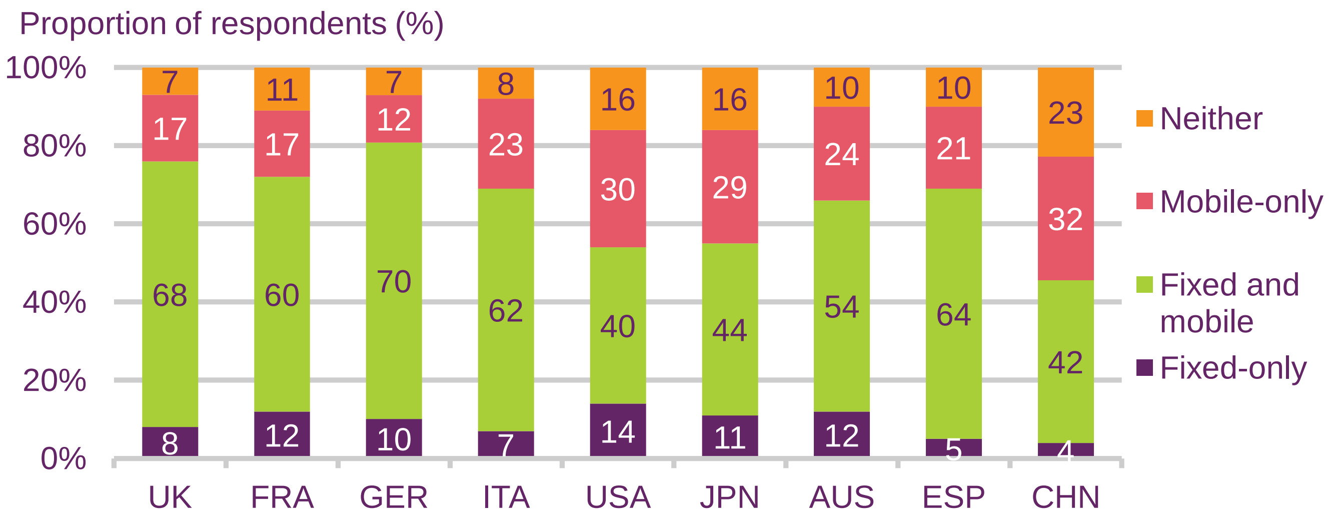


Source: IDATE / industry data / Ofcom

Note: Includes spend by businesses, and is therefore not representative of average consumer spend.

Figure 6.41

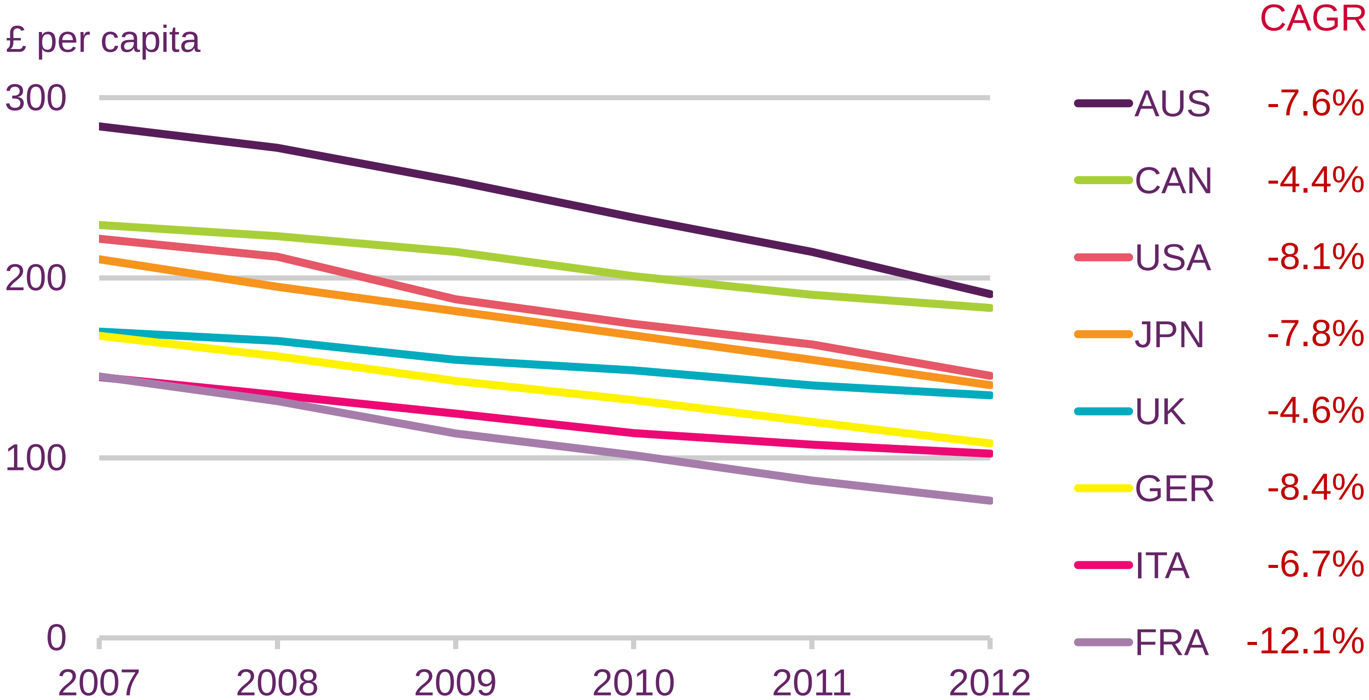
Regular use of fixed and mobile telephony services

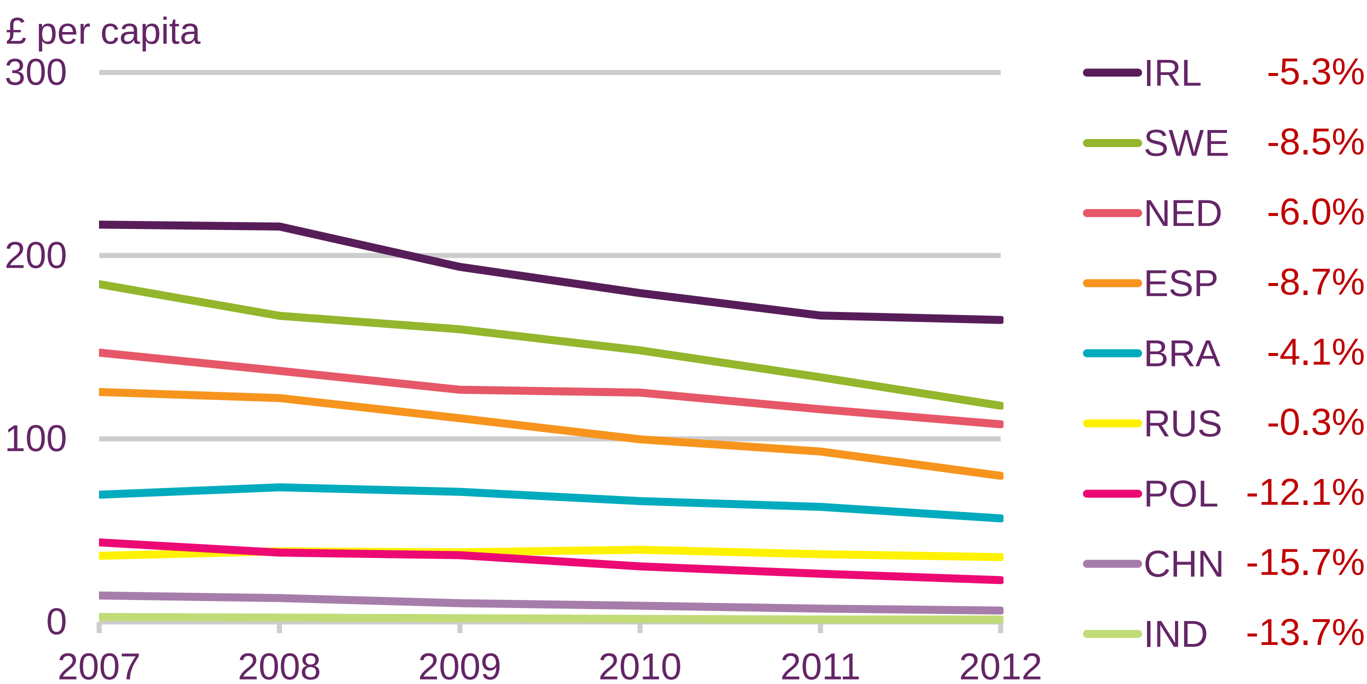


Source: Ofcom research, September 2013

Figure 6.42

Average per-capita fixed voice revenue: 2007 to 2012

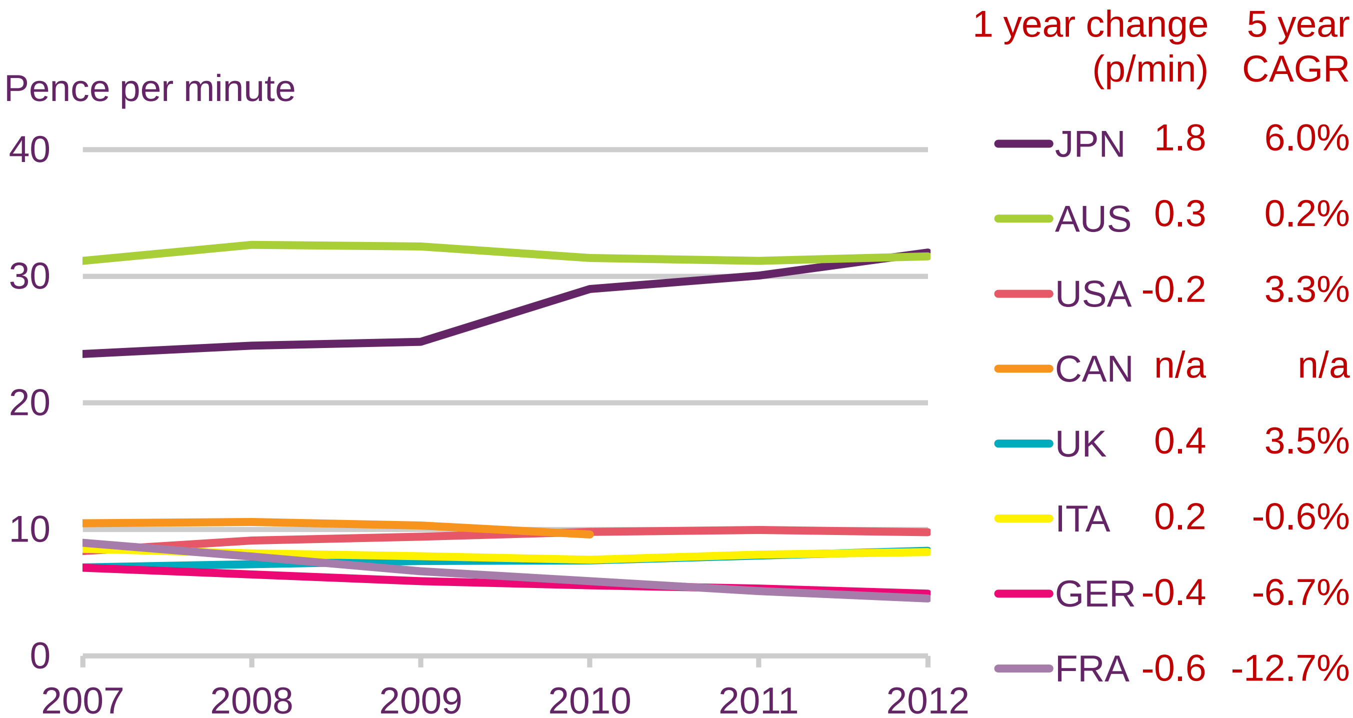


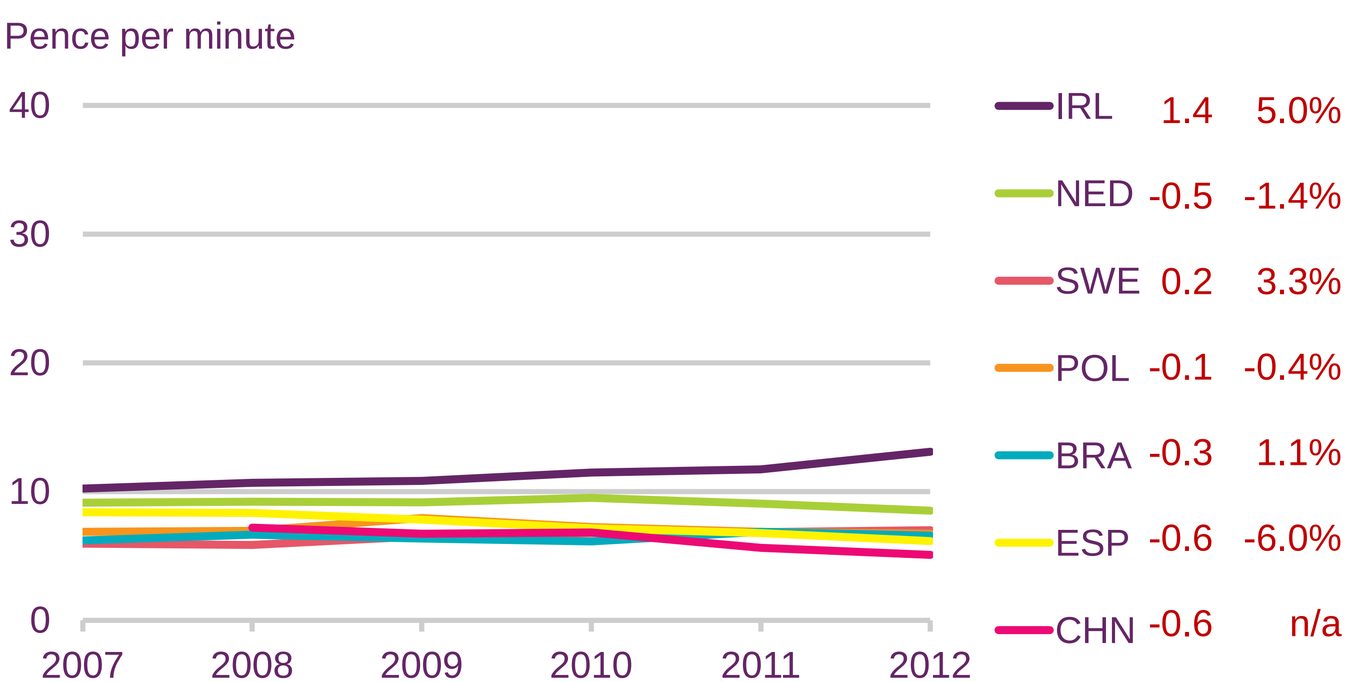


Source: IDATE / industry data / Ofcom

Figure 6.43

Average cost of a fixed voice call minute: 2007 to 2012

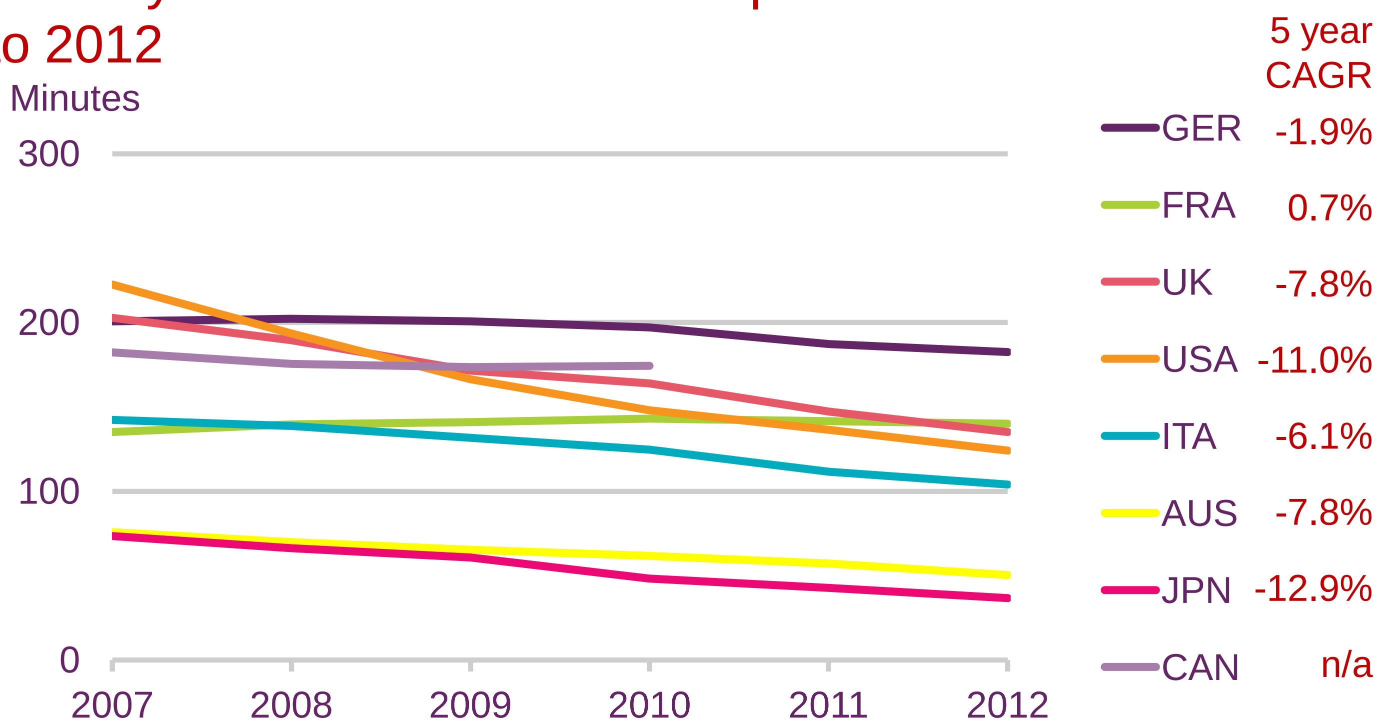


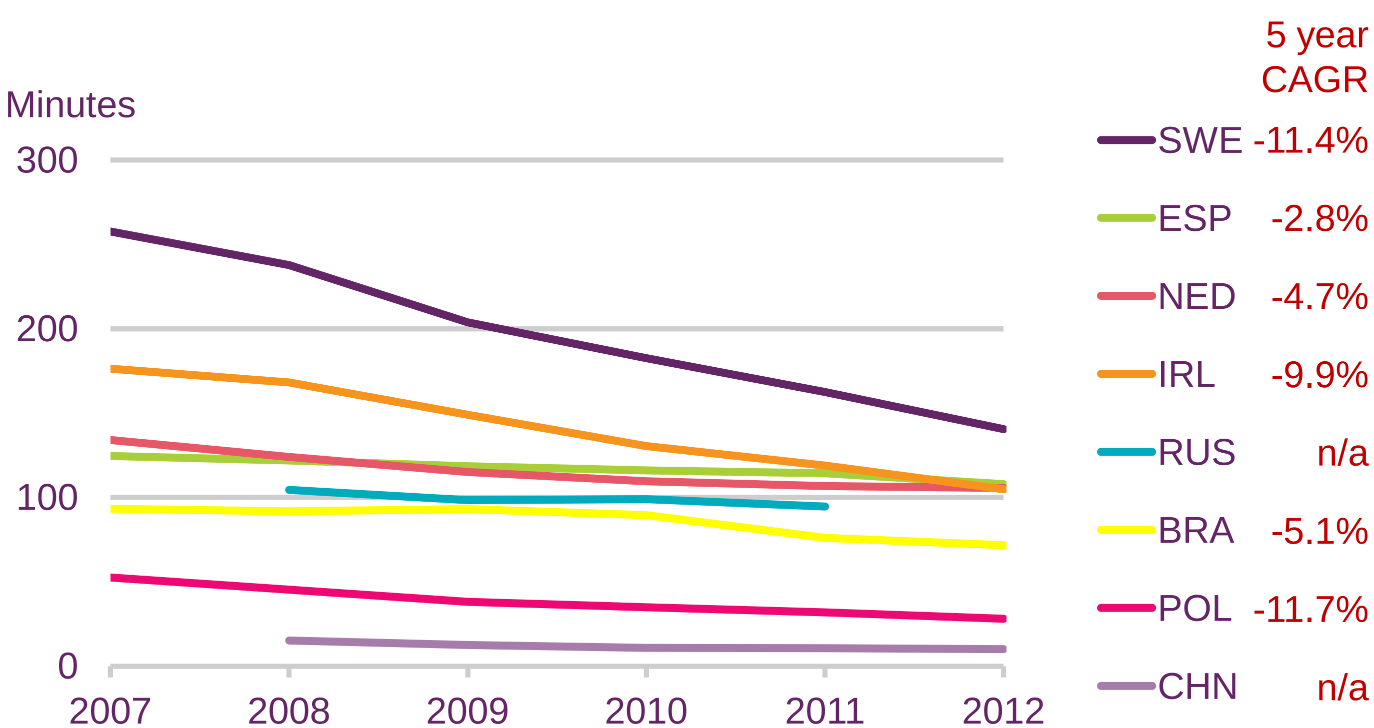


Source: IDATE / industry data / Ofcom

Figure 6.44

Monthly fixed voice call minutes per head: 2007 to 2012

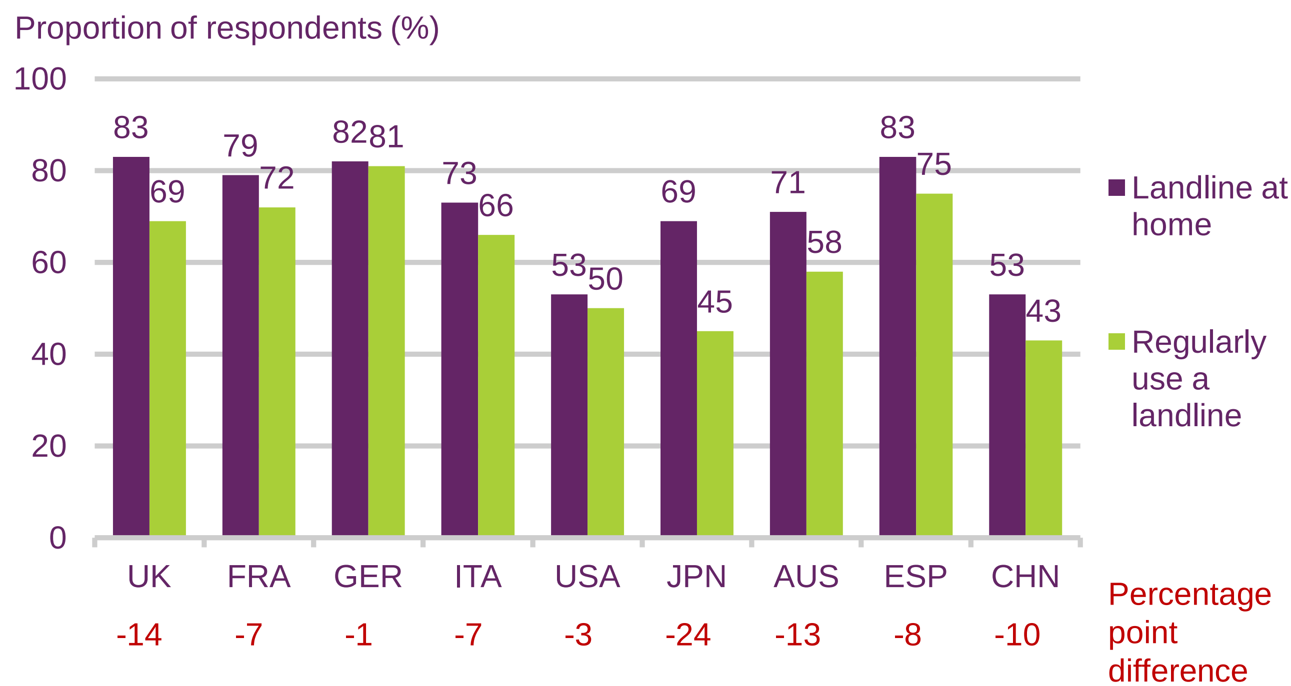




Source: IDATE / industry data / Ofcom

Figure 6.45

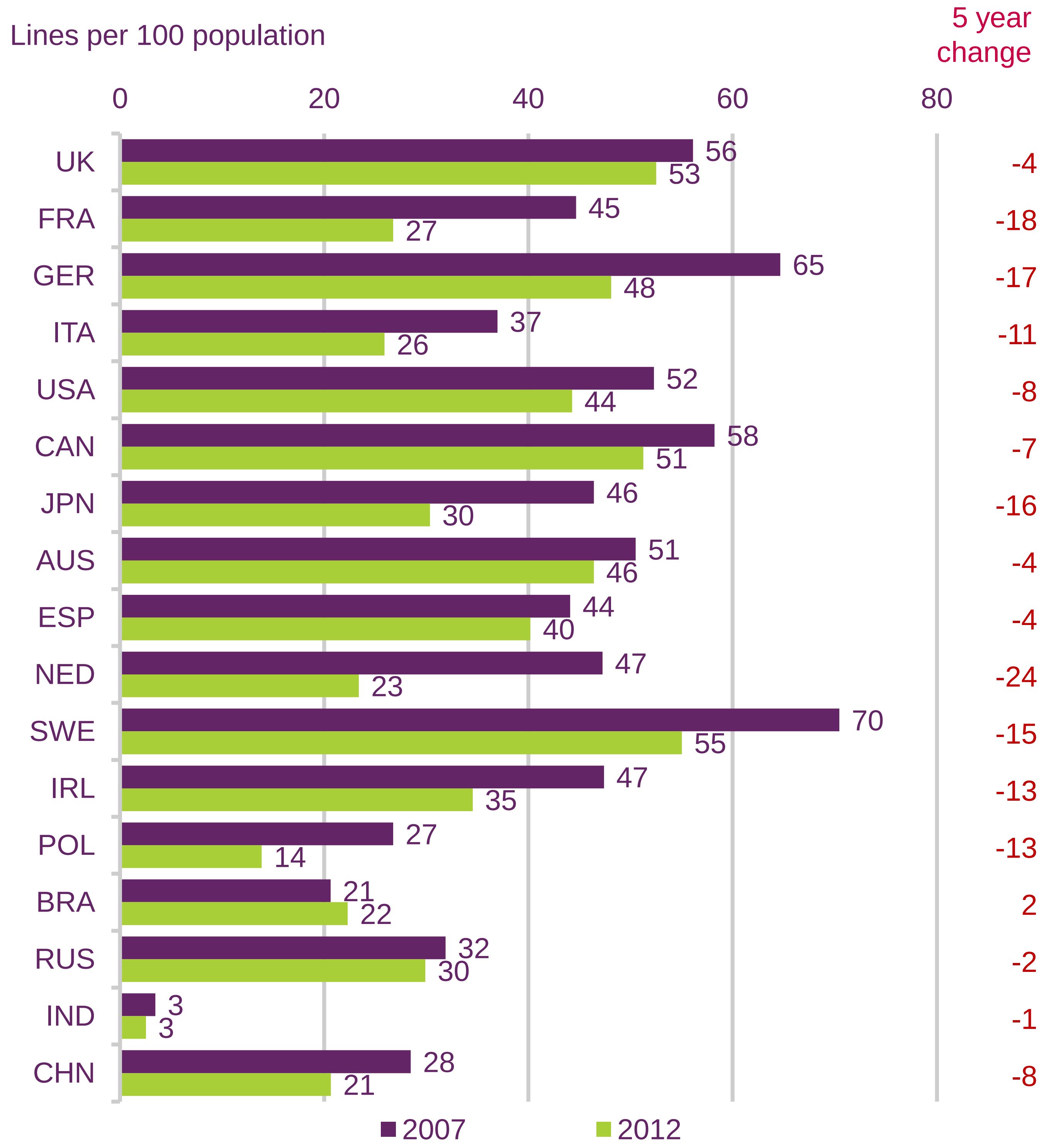
Household take-up and personal use of fixed telephony services



Source: Ofcom research, September 2013
Base: All respondents

Figure 6.46

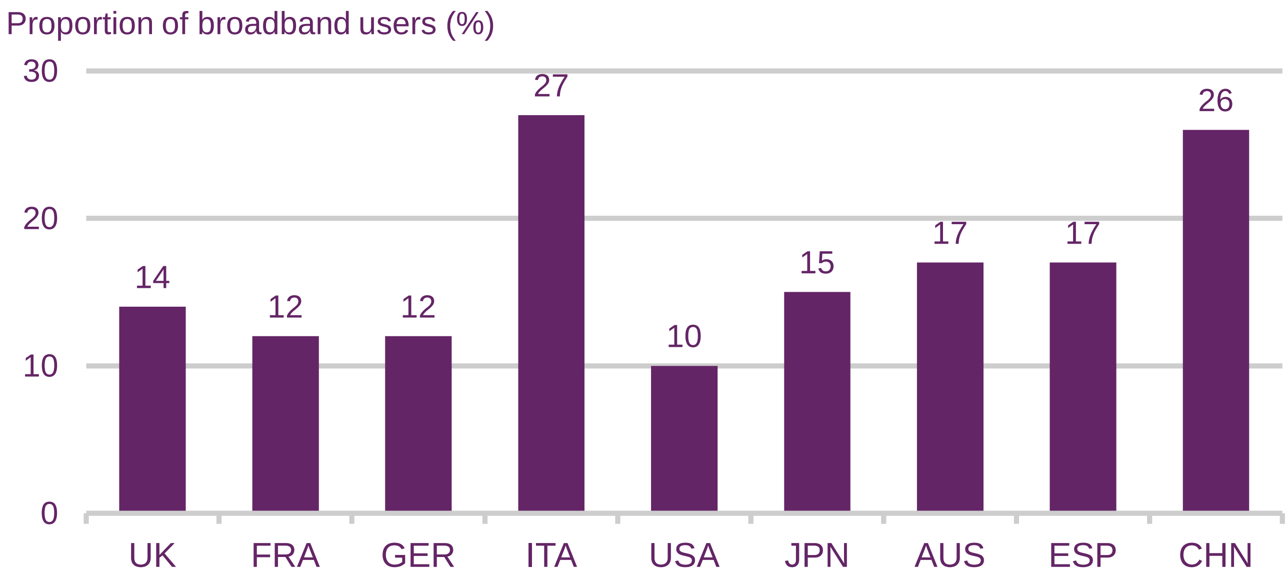
Fixed telephony lines per 100 population: 2007 and 2012



Source: IDATE / industry data / Ofcom

Figure 6.47

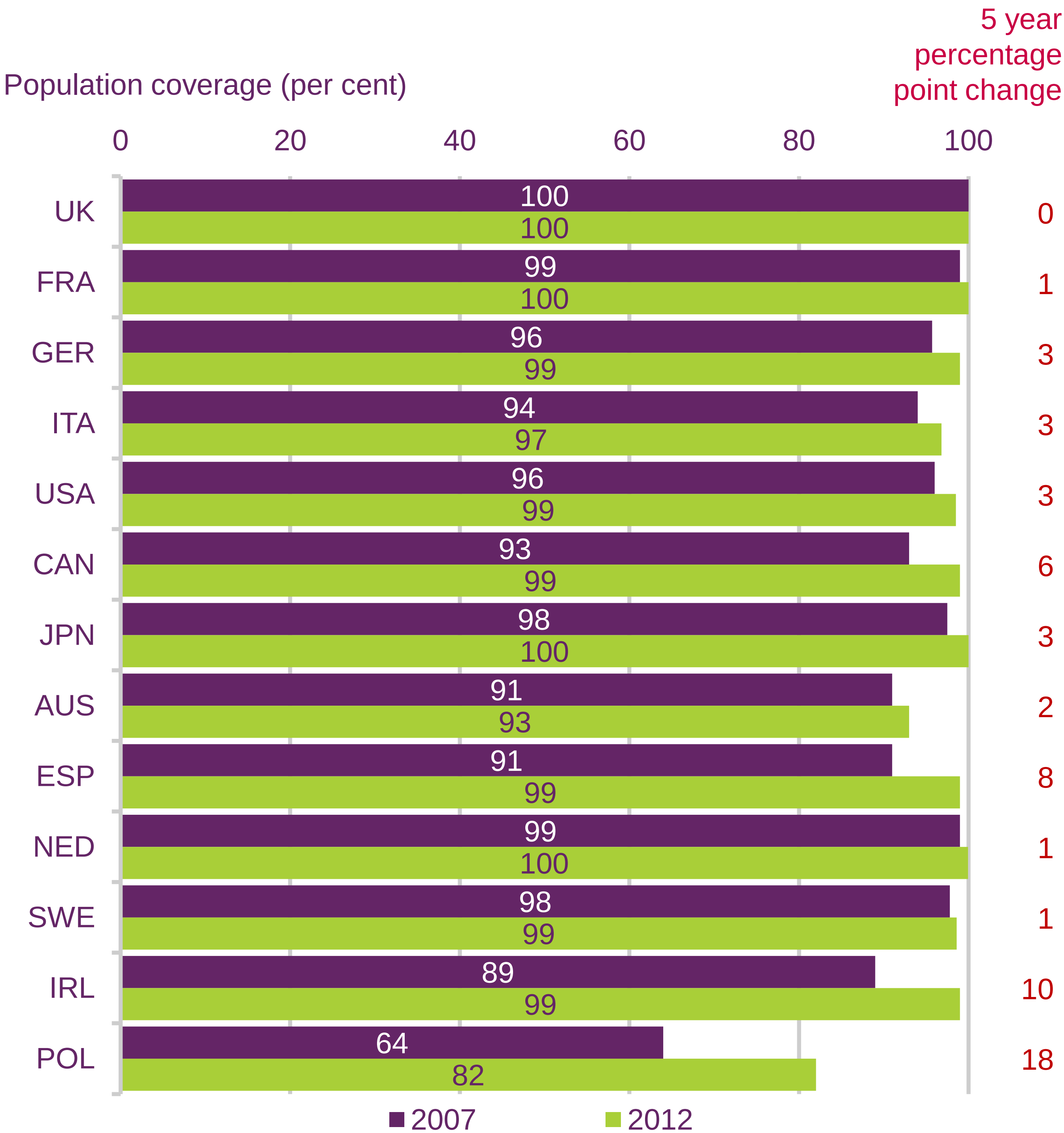
Proportion of fixed broadband users who regularly use their connection to make voice calls



Source: Ofcom research, September 2013
Base: All those with a fixed broadband connection

Figure 6.48

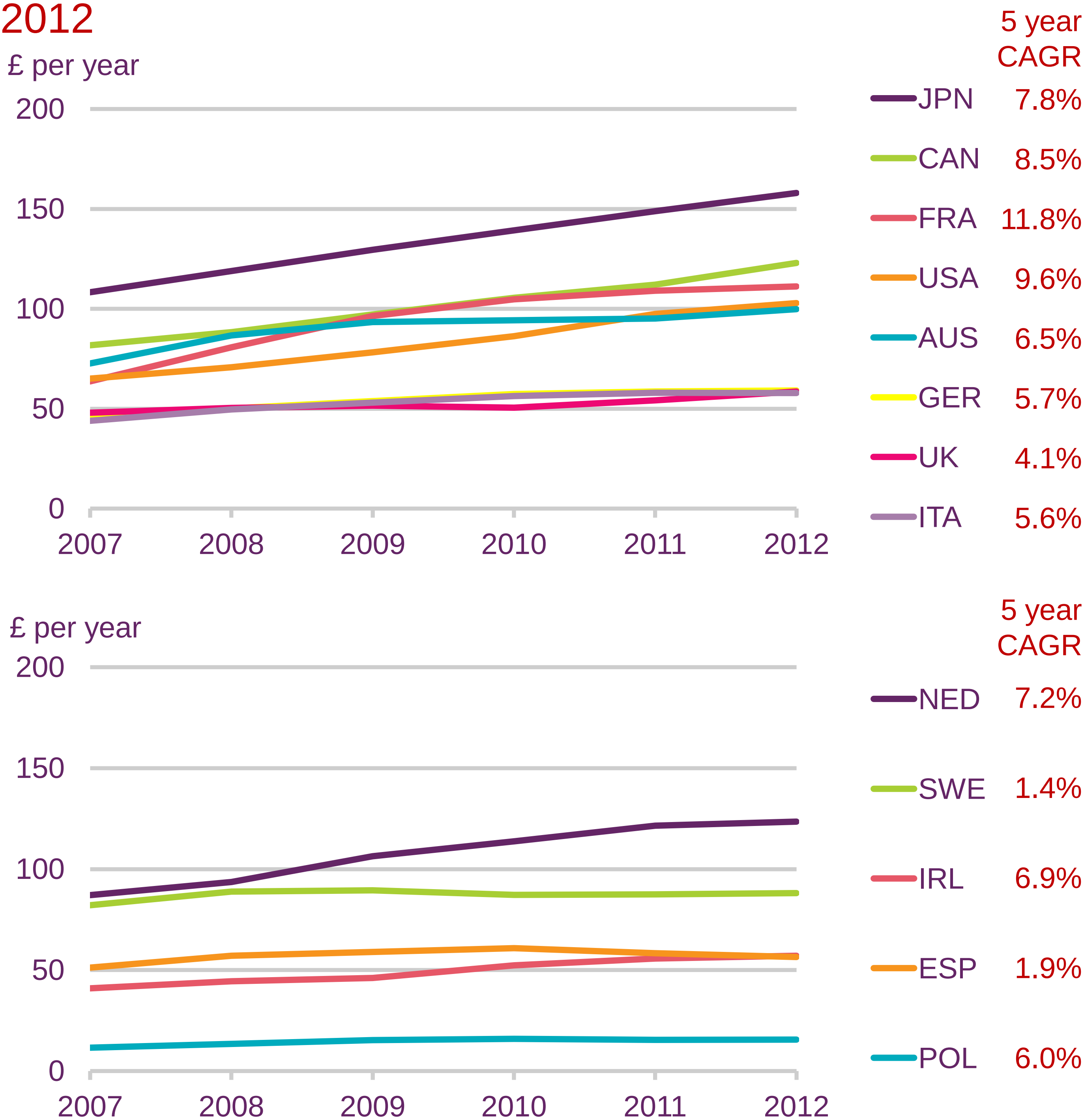
Fixed broadband availability: 2007 and 2012



Source: IDATE / industry data / Ofcom

Figure 6.49

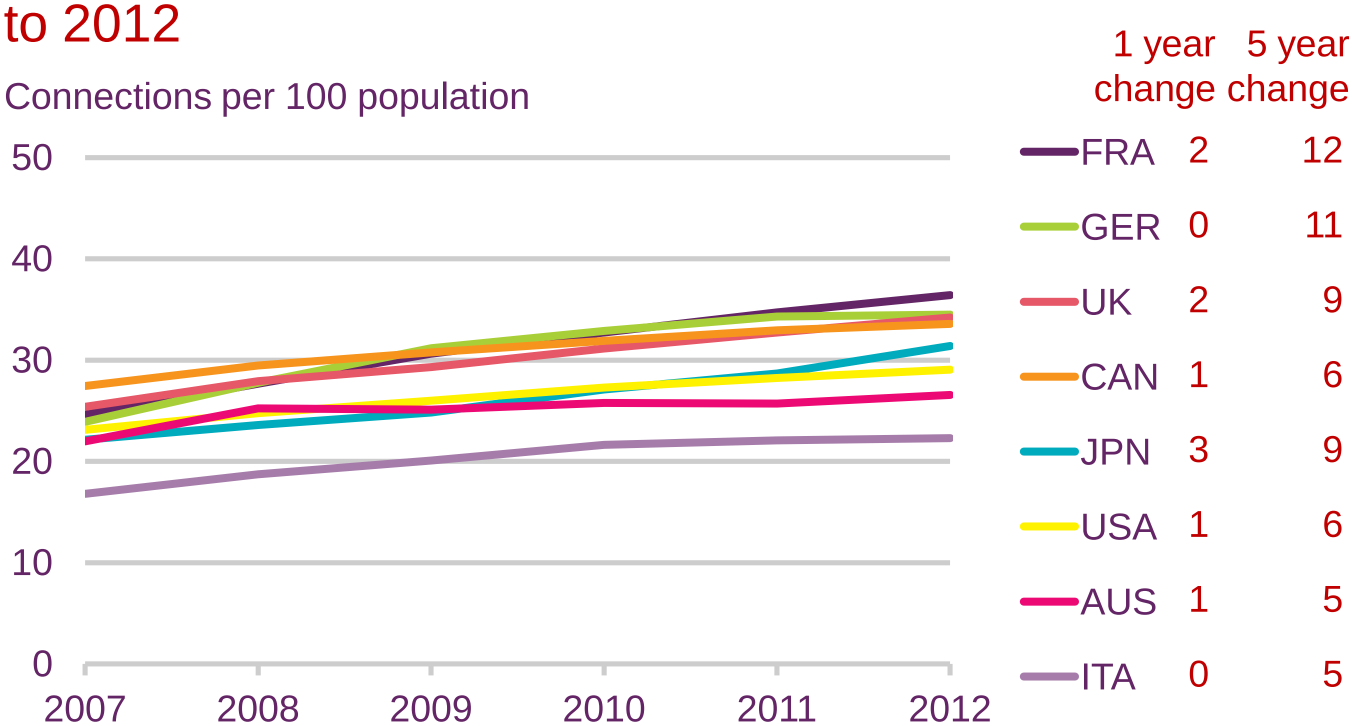
Average per-capita fixed broadband revenue: 2007 to 2012

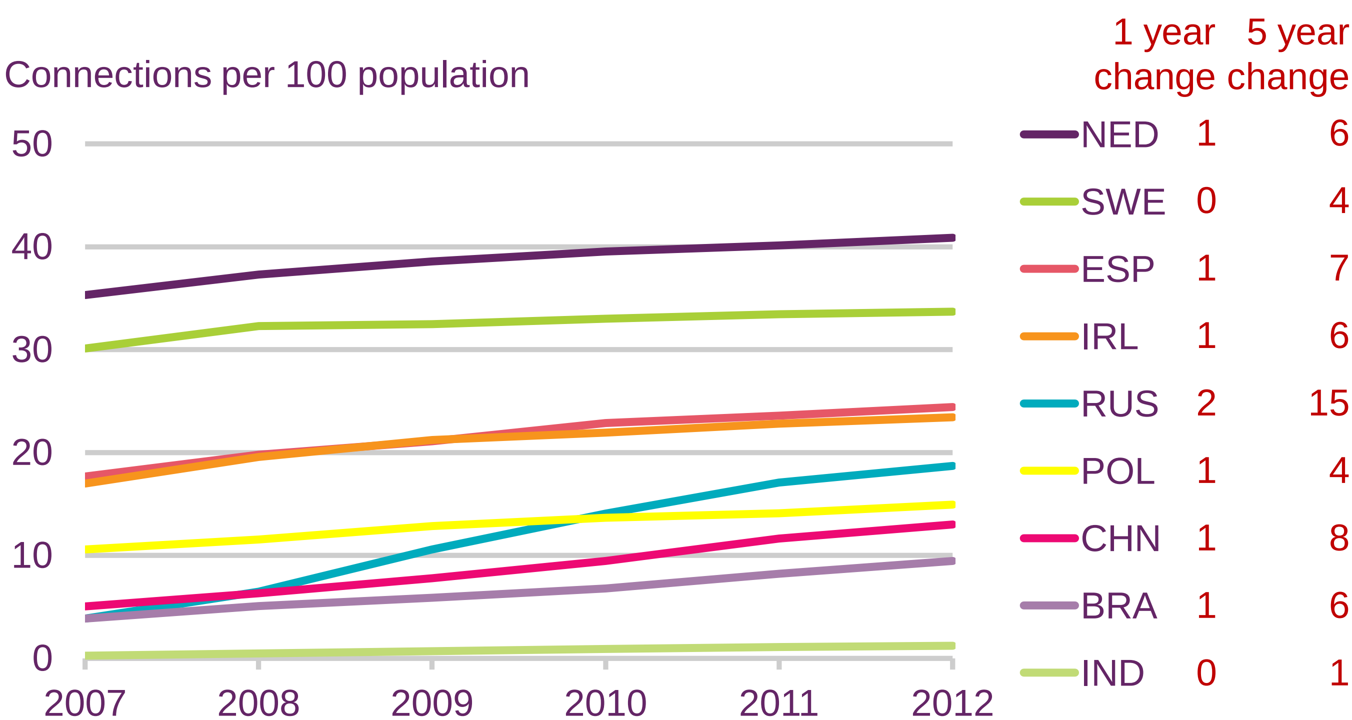


Source: IDATE / industry data / Ofcom

Figure 6.50

Fixed broadband connections per 100 population: 2007 to 2012

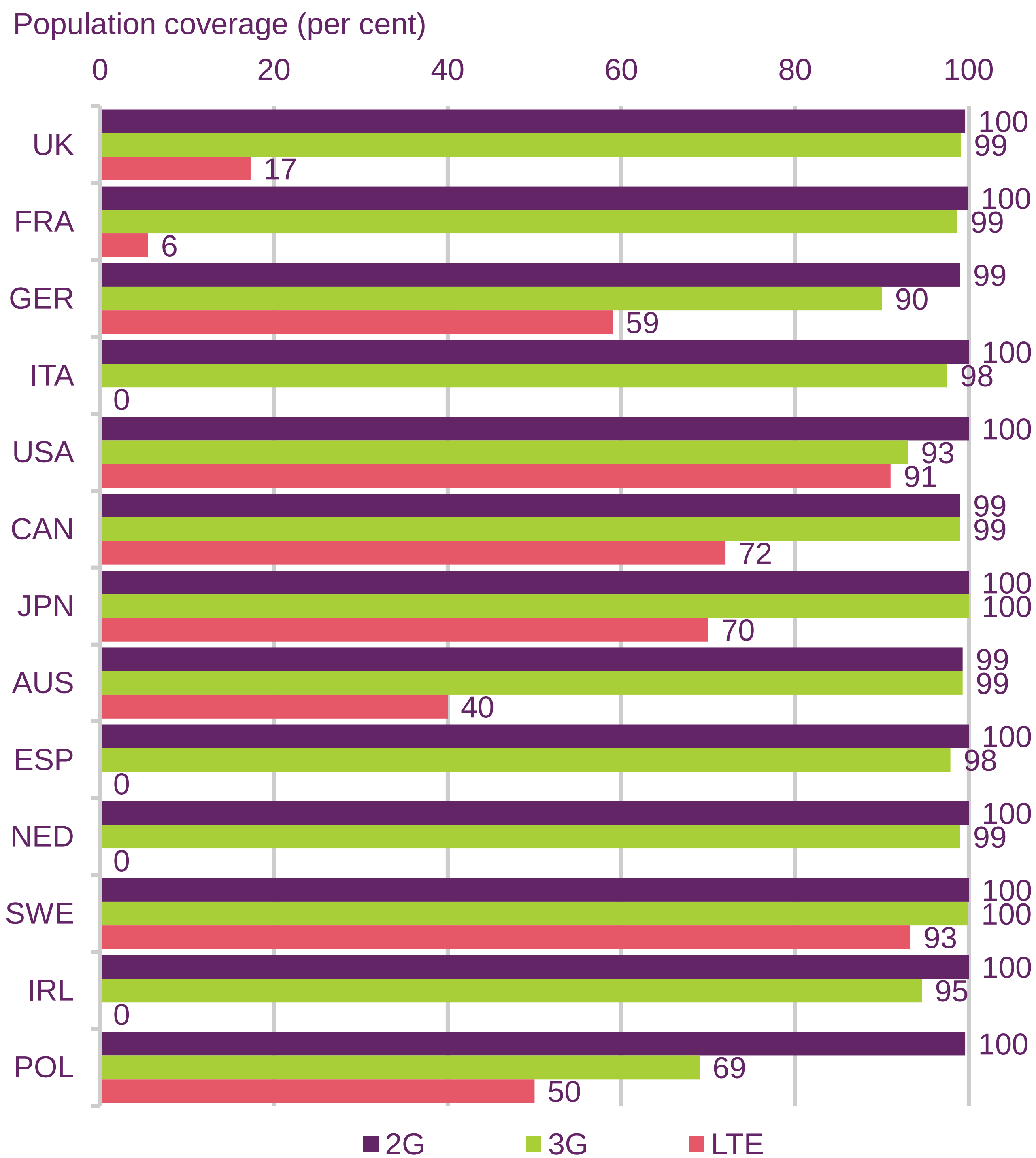




Source: IDATE / industry data / Ofcom

Figure 6.51

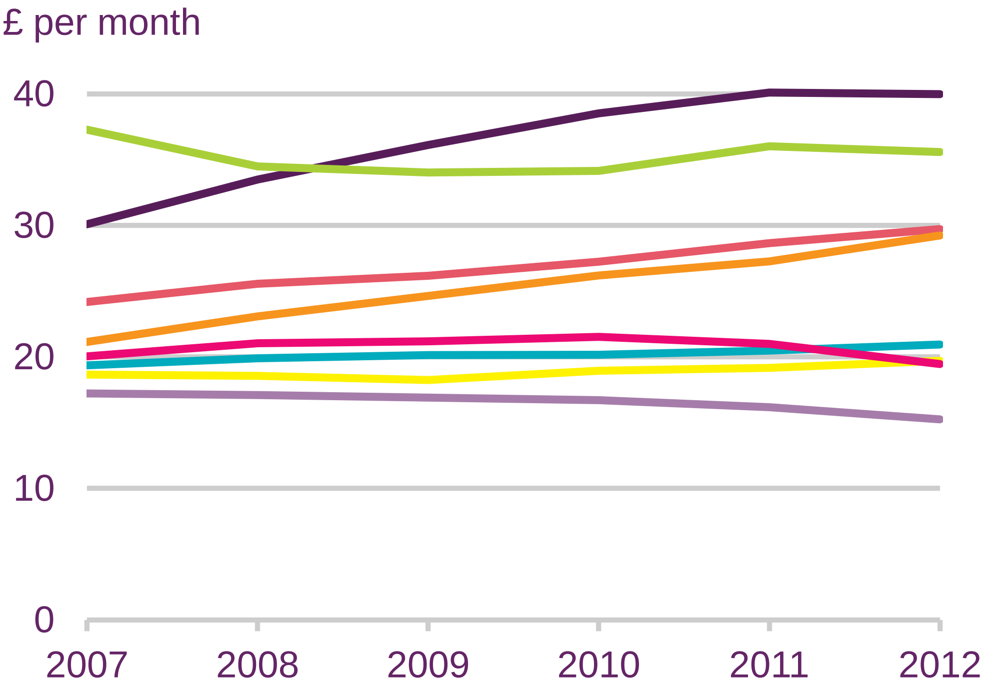
2G, 3G and LTE mobile network availability: end of 2012



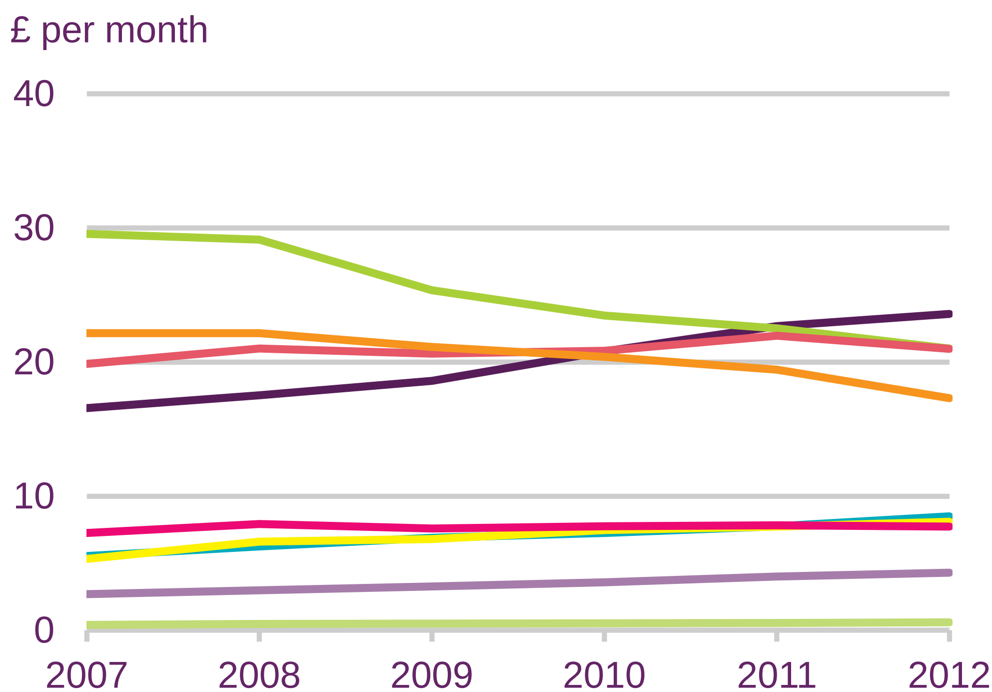
Source: IDATE

Figure 6.52

Average per-capita monthly retail mobile revenue: 2007 to 2012



	1 year change	5 year CAGR
AUS	-0.3%	5.8%
JPN	-1.2%	-0.9%
USA	3.8%	4.2%
CAN	7.2%	6.7%
UK	2.3%	1.6%
GER	2.9%	1.1%
FRA	-7.3%	-0.6%
ITA	-5.8%	-2.4%

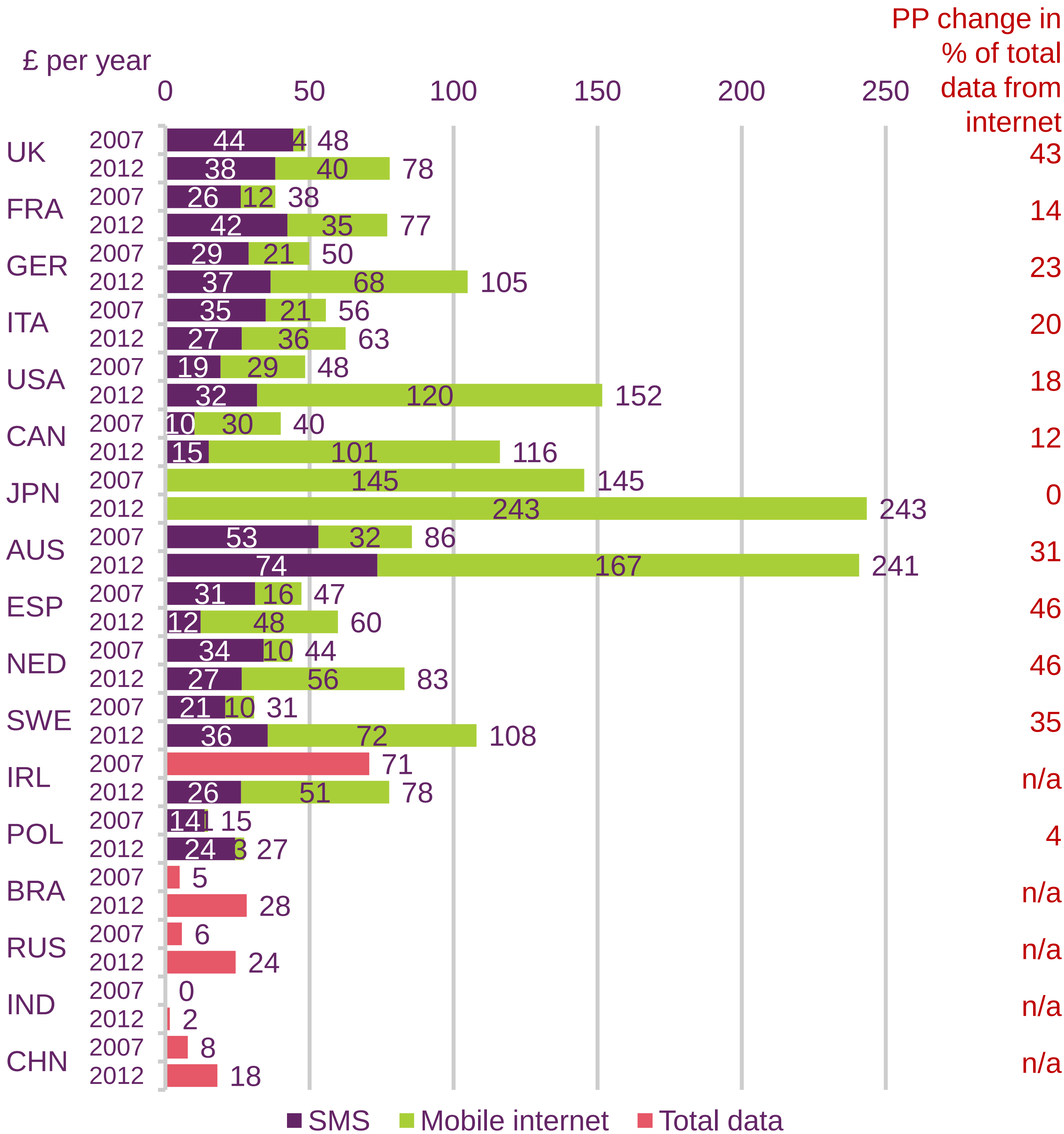


	1 year change	5 year CAGR
SWE	3.9%	7.3%
IRL	-6.7%	-6.6%
NED	-4.4%	1.1%
ESP	-10.9%	-4.8%
BRA	9.6%	8.9%
RUS	4.6%	8.8%
POL	-0.9%	1.3%
CHN	6.9%	9.7%
IND	7.0%	8.1%

Source: IDATE / industry data / Ofcom

Figure 6.53

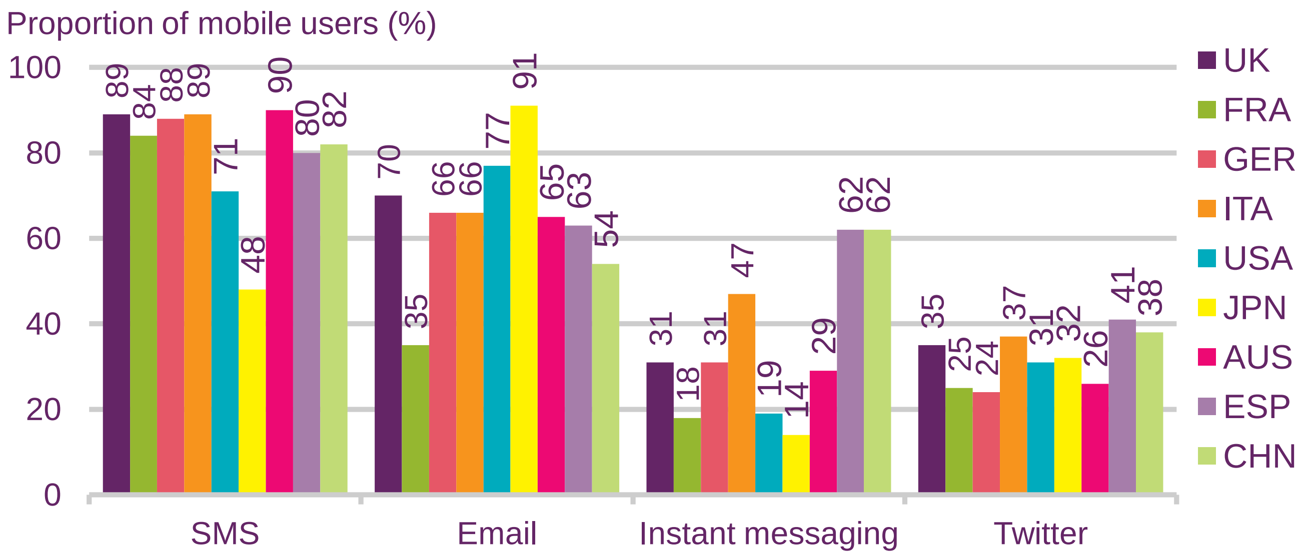
Per-capita mobile data average revenue: 2007 and 2012



Source: IDATE / industry data / Ofcom

Figure 6.54

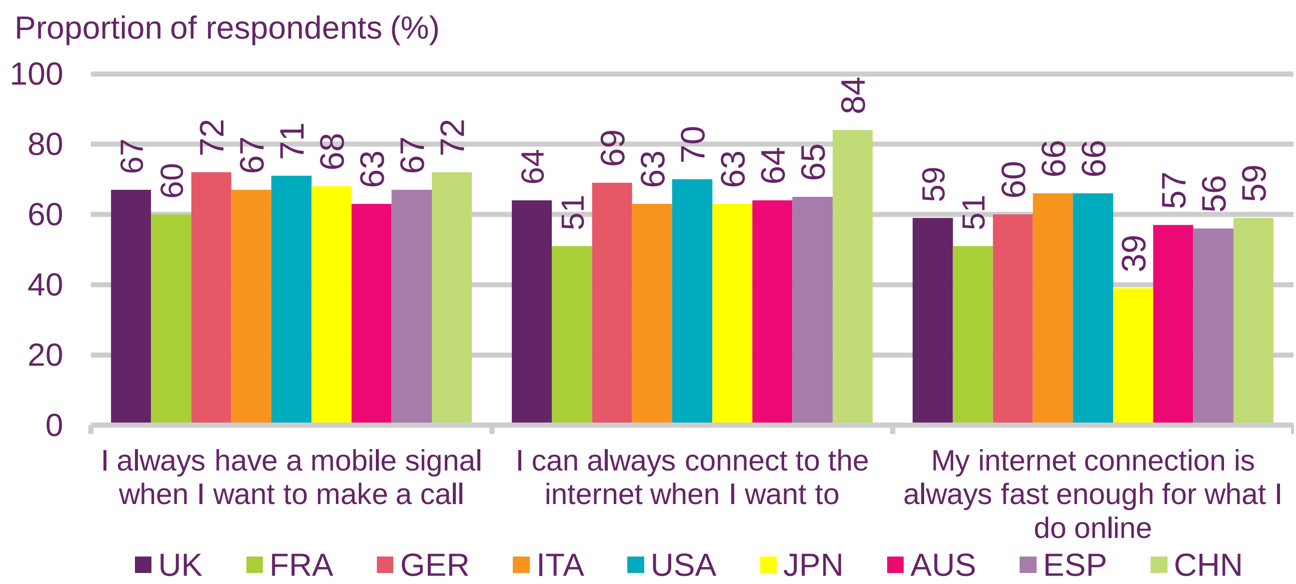
Use of data services on mobile phones



Source: Ofcom research, September 2013
Base: All respondents with a mobile phone

Figure 6.55

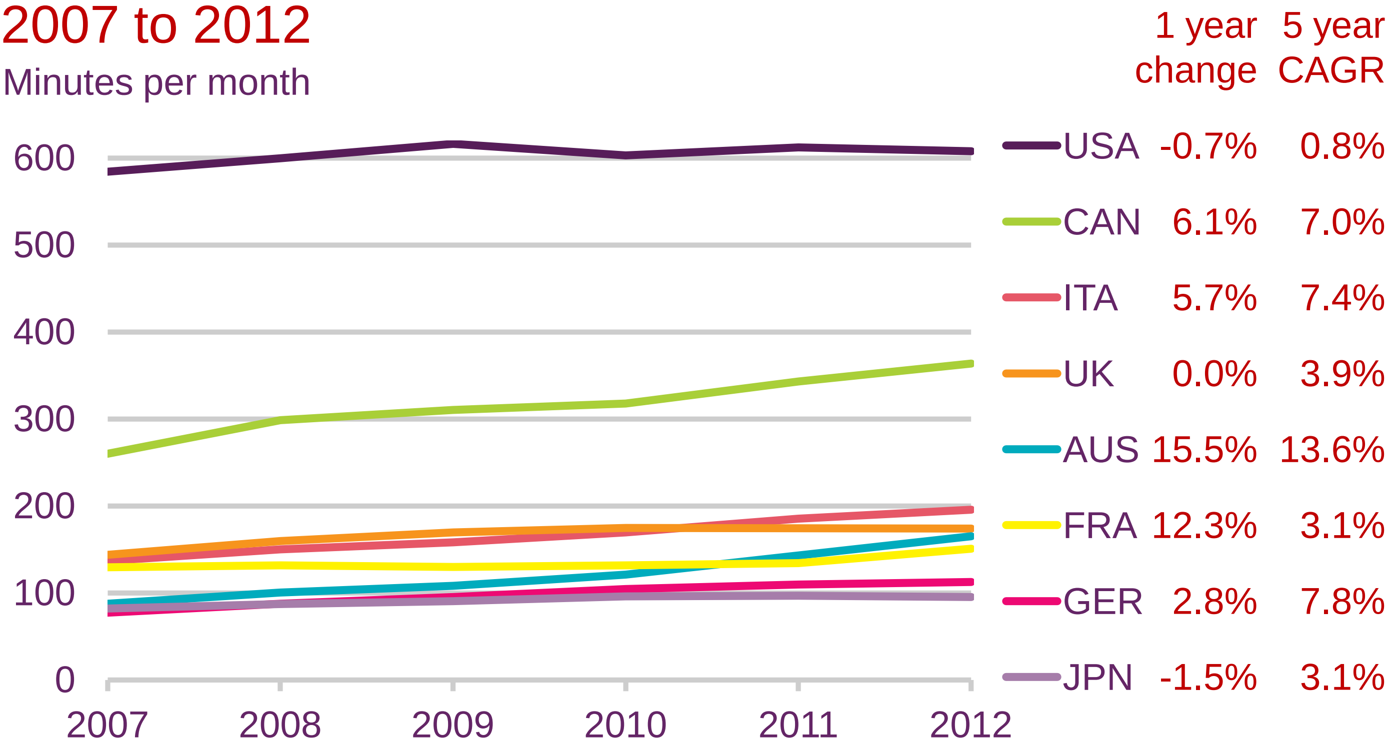
Smartphone connectivity

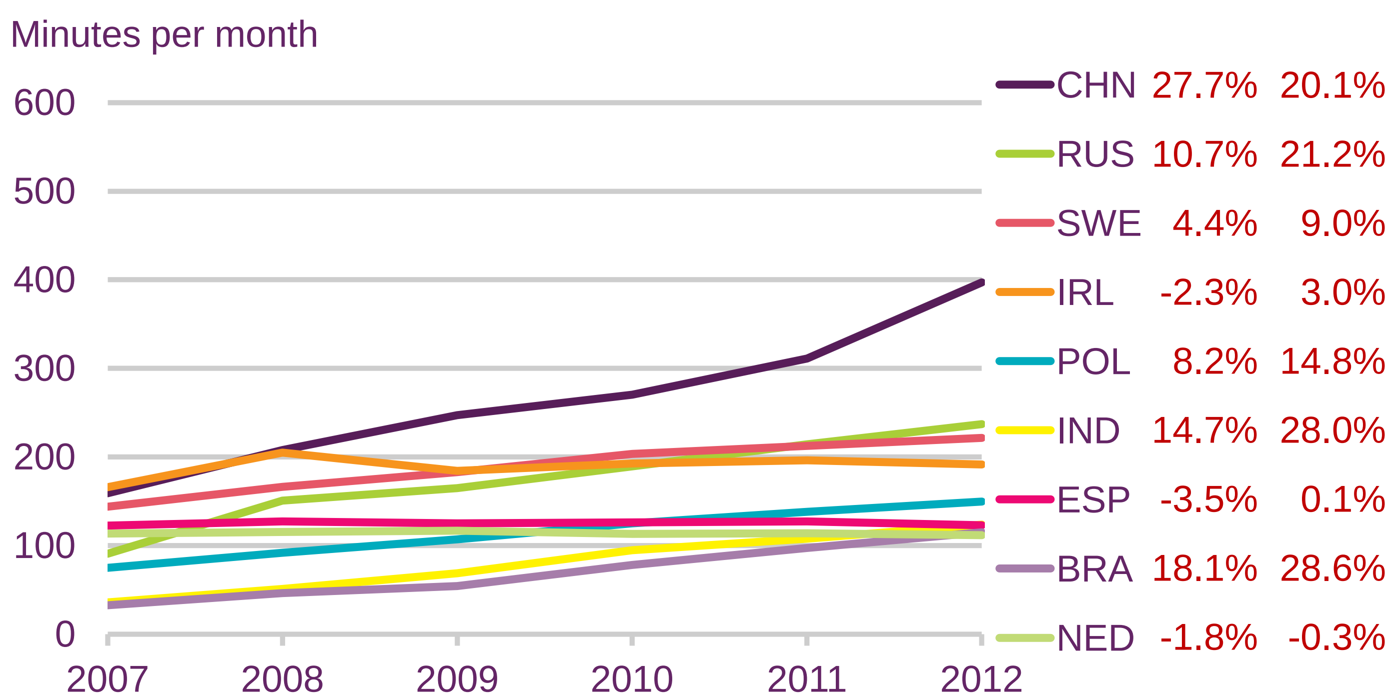


Source: Ofcom research, September 2013
Base: All respondents with a smartphone
Note: “I always have a mobile signal...” figures include all mobile phone users

Figure 6.56

Average per-capita monthly mobile voice call minutes: 2007 to 2012

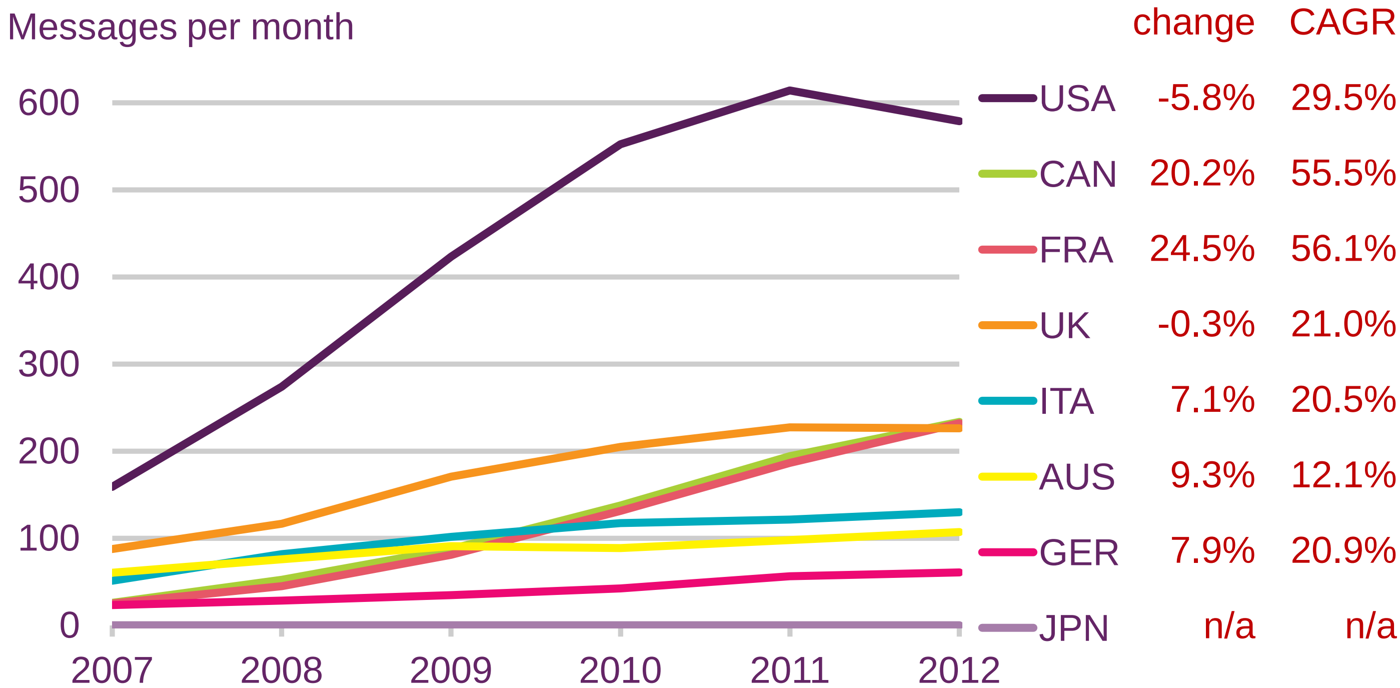


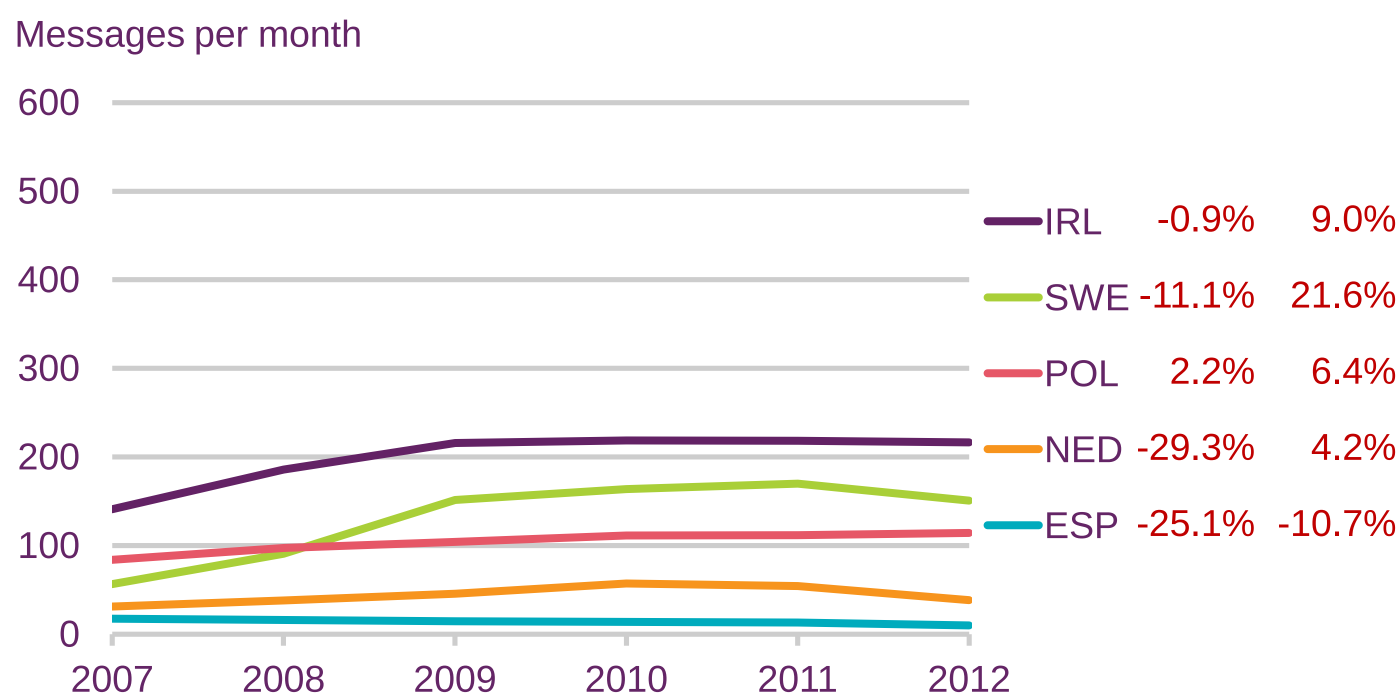


Source: IDATE / industry data / Ofcom
Note: Figures for USA, CAN and CHN also include incoming call minutes

Figure 6.57

Average per-capita monthly mobile text messages: 2007 to 2012

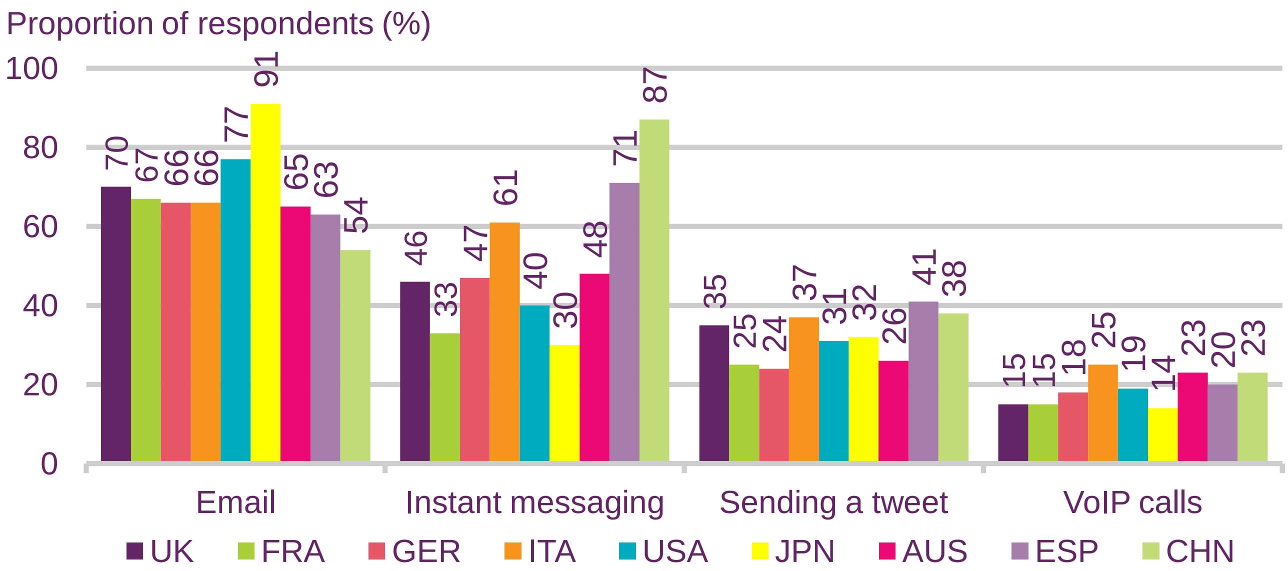




Source: IDATE / industry data / Ofcom

Figure 6.58

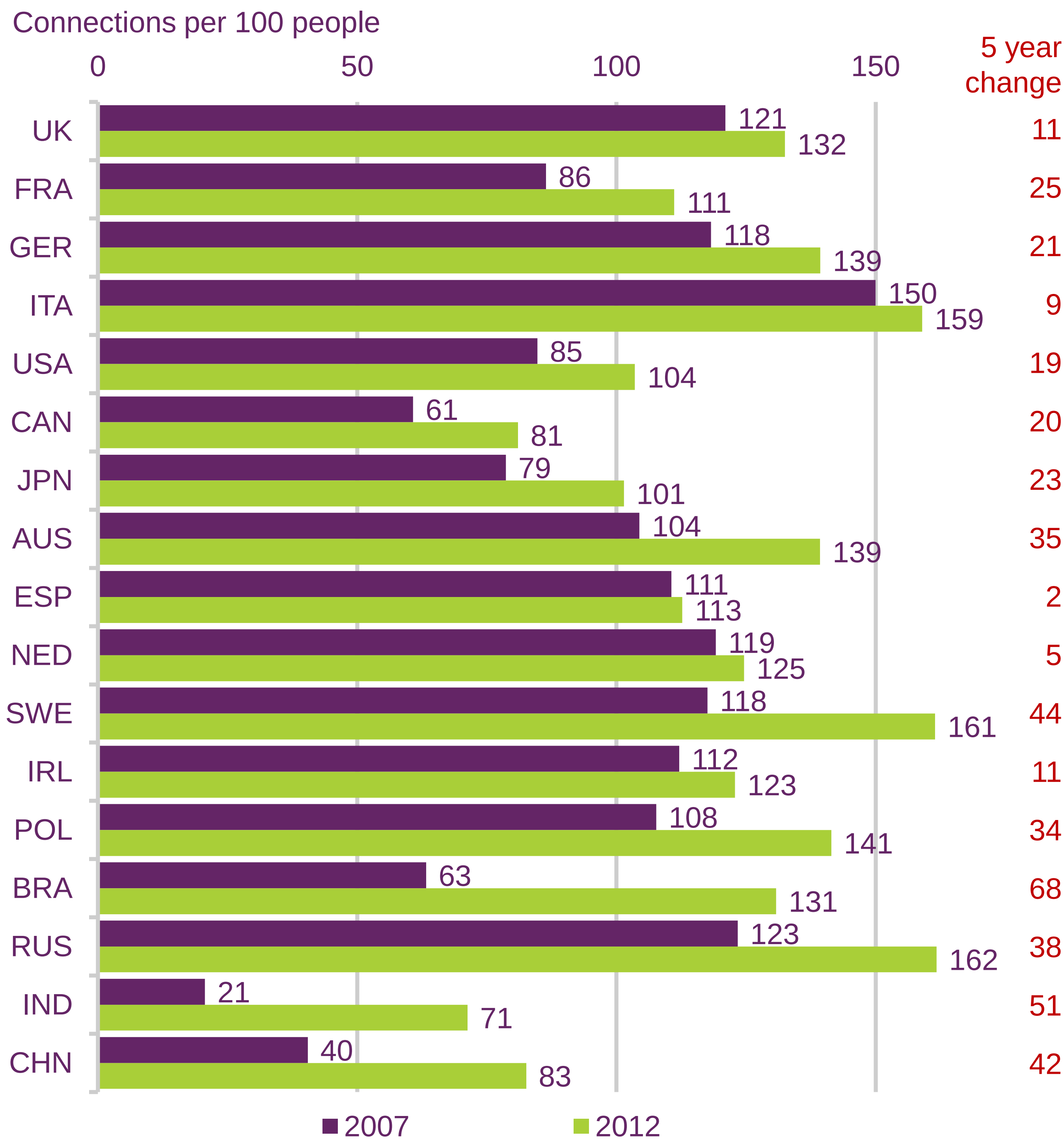
Activities undertaken on a mobile phone



Source: Ofcom research, September 2013
Base: All respondents who access the internet on a mobile phone

Figure 6.59

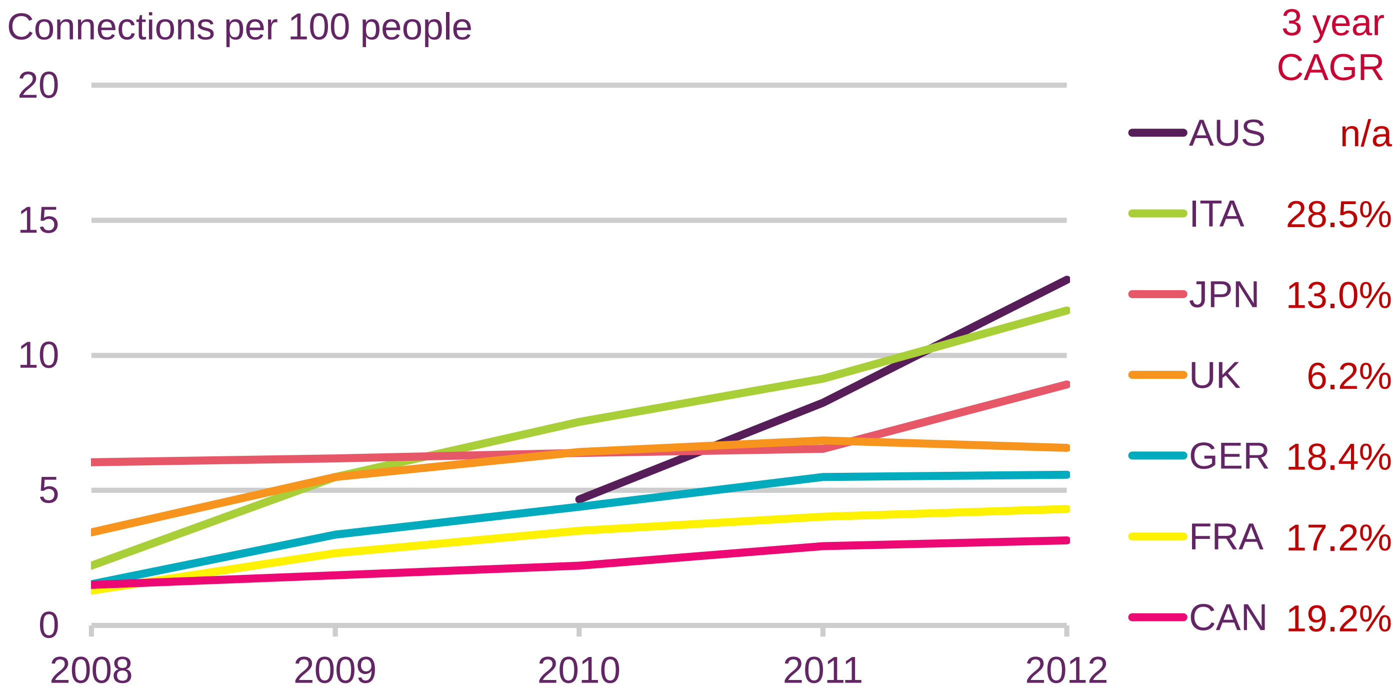
Mobile connections per 100 people: 2007 and 2012

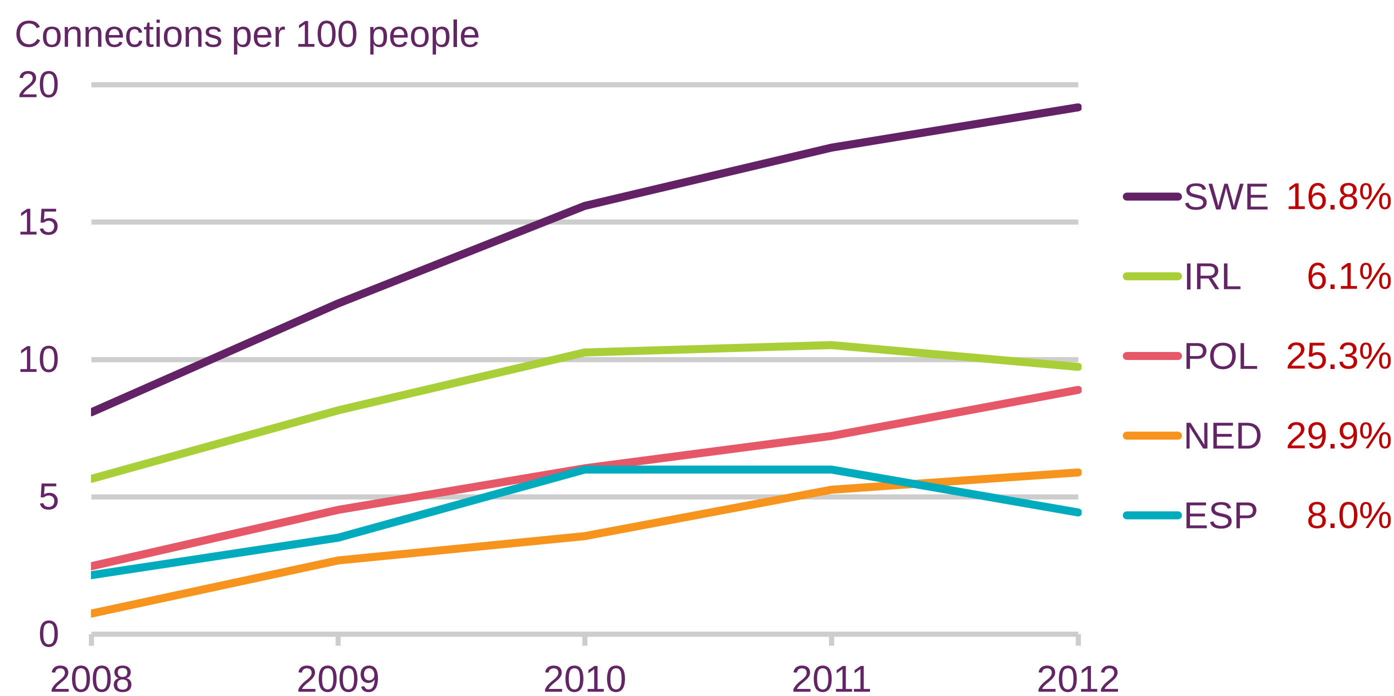


Source: IDATE / industry data / Ofcom

Figure 6.60

Mobile broadband connections per 100 people: 2008 to 2012





Source: IDATE / industry data / Ofcom

Note: Figures for the US include mobile data access on a mobile handset