

The International Communications
Market 2008

8 Country Profiles

Country profiles

This section provides a brief overview of each of the key comparator countries used in this report. The profile of each country includes basic demographic and economic information and market data for the telecoms and broadcasting industries.

The data in this section should provide both a context for analysing the trends described in this publication, and a flavour of the communications market in each of the key comparator countries.

Sources used for these country profiles include: IDATE and the World Bank.

UK



Basic country data 2007

Size (km ²)	243,600
Population (m)	60.8
Households (m)	26.1
GDP (£bn)	1,363
GDP per capita (£)	22,431

Telecoms market data

	2004	2005	2006	2007
Revenues (£m)				
Fixed-line	10,576	9,825	9,432	9,250
Mobile	11,971	13,049	13,832	15,122
Internet	1,270	1,693	2,194	2,560
Total	23,817	24,567	25,459	26,932
Take-up (m)				
Fixed-line	34.6	34.1	33.6	33.7
Mobile subscriptions	59.7	65.4	69.8	73.5
Broadband connections	6.1	9.9	13.0	15.6
Penetration (%)				
Fixed-line (individuals)	58%	57%	56%	56%
Mobile (individuals)	99%	108%	115%	121%
Broadband (households)	24%	39%	50%	60%

Largest telecoms operators: Q4 2007

Mobile	O2 (excl. Tesco Mobile)	25%
	Vodafone	24%
	T-Mobile (incl. Virgin Mobile)	24%
Broadband	BT Retail	27%
	Virgin Media	24%
	Carphone Warehouse	17%

Broadcasting market data

	2002	2003	2004	2005	2006	2007
TV revenues (£m)						
Subscription	2,883	3,252	3,585	3,891	4,029	4,288
Public funding	2,216	2,302	2,319	2,433	2,521	2,615
Advertising	3,147	3,242	3,481	3,548	3,469	3,544
Total	8,246	8,796	9,385	9,872	10,019	10,447
Radio revenues (£m)						
Public funding	524	580	610	640	582	570
Advertising	518	604	641	614	650	693
Total	1,042	1,183	1,250	1,253	1,231	1,262
TV take-up (m)						
TV homes	25.3	25.5	25.6	25.7	25.8	25.9
Multichannel homes	11.0	13.4	15.7	18.2	20.1	22.5
Digital TV homes	9.5	12.4	14.9	17.6	19.8	22.2
Penetration in TV homes (%)						
Multichannel homes	43%	52%	61%	71%	78%	87%
Digital TV homes	37%	48%	58%	68%	77%	86%

France



Basic country data

Size (km²)	551,500
Population (m)	63.7
Households (m)	26.8
GDP (£bn)	1,281
GDP per capita (£)	20,109

Note: Population includes French overseas territories.

Telecoms market data

	2004	2005	2006	2007
Revenues (£m)				
Fixed-line	9,516	9,166	8,742	8,371
Mobile	10,771	11,775	12,280	12,994
Internet	1,367	1,805	2,325	2,991
Total	21,654	22,747	23,346	24,356
Take-up (m)				
Fixed-line	33.6	33.1	31.6	28.7
Mobile subscriptions	44.5	48.0	51.5	55.3
Broadband connections	6.8	9.4	12.7	15.6
Penetration (%)				
Fixed-line (individuals)	54%	53%	50%	45%
Mobile (individuals)	71%	76%	81%	87%
Broadband (households)	26%	37%	48%	58%

Largest telecoms operators: Q4 2007

Mobile	Orange	43%
	SFR	35%
	Bouygues	17%
Broadband	Orange	47%
	Neuf cegetel	21%
	Free	19%

Broadcasting market data

	2002	2003	2004	2005	2006	2007
TV revenues (£m)						
Subscription	2,585	2,748	2,826	2,873	3,078	3,283
Public funding	1,006	1,026	1,192	1,230	1,255	1,286
Advertising	2,017	2,058	2,192	2,214	2,313	2,402
Total	5,608	5,831	6,209	6,317	6,647	6,971
Radio revenues (£m)						
Public funding	519	572	579	602	608	614
Advertising	379	431	455	462	468	458
Total	899	1,003	1,034	1,064	1,076	1,073
TV take-up (m)						
TV homes	23.2	23.5	23.6	24.3	24.5	24.7
Multichannel homes	10.6	11.0	11.3	13.0	17.9	20.9
Digital TV homes	4.3	5.0	5.5	7.4	13.0	16.4
Penetration in TV homes (%)						
Multichannel homes	46%	47%	48%	53%	73%	84%
Digital TV homes	19%	21%	23%	30%	53%	66%

Germany



Basic country data, 2007

Size (km ²)	357,100
Population (m)	82.4
Households (m)	39.4
GDP (£bn)	1,648
GDP per capita (£)	19,998

Telecoms market data

	2004	2005	2006	2007
Revenues (£m)				
Fixed-line	13,830	13,373	12,563	11,737
Mobile	15,974	15,594	15,956	15,472
Internet	1,698	2,038	2,517	3,218
Total	31,501	31,366	31,036	30,427
Take-up (m)				
Fixed-line	54.7	54.9	54.8	54.4
Mobile subscriptions	71.3	79.2	85.4	97.2
Broadband connections	7.0	10.7	14.7	19.6
Penetration (%)				
Fixed-line (individuals)	66%	67%	67%	66%
Mobile (individuals)	87%	96%	104%	118%
Broadband (households)	18%	28%	38%	50%

Largest telecoms operators: Q4 2007

Mobile	T-Mobile	37%
	Vodafone	35%
	E-Plus	15%
Broadband	Deutsche Telekom	46%
	United Internet	14%
	Arcor	13%

Broadcasting market data

	2002	2003	2004	2005	2006	2007
TV revenues (£m)						
Subscription	2,863	2,902	2,985	3,044	3,031	3,061
Public funding	2,856	2,800	2,818	3,125	3,187	3,251
Advertising	2,708	2,612	2,640	2,688	2,815	2,961
Total	8,427	8,315	8,443	8,857	9,033	9,273
Radio revenues (£m)						
Public funding	1,576	1,701	1,712	1,764	1,807	1,812
Advertising	373	396	423	454	465	496
Total	1,949	2,097	2,135	2,218	2,271	2,308
TV take-up (m)						
TV homes	37.4	37.4	37.6	37.6	37.7	37.6
Multichannel homes	34.8	35.4	36.0	36.7	37.1	37.5
Digital TV homes	4.0	4.7	5.8	7.6	10.2	12.2
Penetration in TV homes (%)						
Multichannel homes	93%	95%	96%	97%	98%	100%
Digital TV homes	11%	13%	15%	20%	27%	32%

Italy



Basic country data

Size (km ²)	301,300
Population (m)	58.1
Households (m)	24.4
GDP (£bn)	1,053
GDP per capita (£)	18,114

Telecoms market data

	2004	2005	2006	2007
Revenues (£m)				
Fixed-line	8,681	8,219	7,980	7,629
Mobile	9,560	10,257	10,261	10,603
Internet	1,084	1,406	1,977	2,298
Total	19,325	19,882	20,218	20,530
Take-up (m)				
Fixed-line	29.1	28.0	26.0	25.8
Mobile subscriptions	62.5	71.5	80.5	89.8
Broadband connections	4.7	7.0	8.6	9.9
Penetration (%)				
Fixed-line (individuals)	50%	48%	45%	44%
Mobile (individuals)	108%	123%	139%	154%
Broadband (households)	21%	30%	36%	41%

Largest telecoms operators: Q4 2007

Mobile	TIM	41%
	Vodafone	33%
	Wind	17%
Broadband	Telecom Italia	67%
	Wind	12%
	Fast Web	11%

Broadcasting market data

	2002	2003	2004	2005	2006	2007
TV revenues (£m)						
Subscription	822	802	1,088	1,369	1,750	2,029
Public funding	1,003	1,039	1,070	1,070	1,092	1,114
Advertising	2,218	2,717	3,038	3,194	3,145	3,183
Total	4,043	4,558	5,197	5,633	5,987	6,326
Radio revenues (£m)						
Public funding	396	437	444	449	455	480
Advertising	238	294	356	356	385	480
Total	634	731	800	806	840	961
TV take-up (m)						
TV homes	22.1	22.1	22.1	22.6	22.8	22.9
Multichannel homes	4.8	5.1	7.2	10.1	11.8	13.7
Digital TV homes	3.1	3.3	5.7	8.8	10.7	12.7
Penetration in TV homes (%)						
Multichannel homes	22%	23%	32%	45%	52%	60%
Digital TV homes	14%	15%	26%	39%	47%	56%

USA



Basic country data, 2006

Size (km ²)	9,632,000
Population (m)	301.1
Households (m)	116.2
GDP (£bn)	6,902
GDP per capita (£)	22,921

Telecoms market data

	2004	2005	2006	2007
Revenues (£m)				
Fixed-line	57,426	54,531	50,891	47,504
Mobile	51,037	56,743	62,700	69,403
Internet	7,807	10,209	12,732	16,058
Total	116,270	121,483	126,323	132,965
Take-up (m)				
Fixed-line	177.7	175.2	167.5	160.0
Mobile subscriptions	175.5	207.9	233.0	256.8
Broadband connections	35.6	47.1	56.8	71.2
Penetration (%)				
Fixed-line (individuals)	61%	59%	57%	53%
Mobile (individuals)	60%	70%	78%	85%
Broadband (households)	32%	42%	50%	62%

Largest telecoms operators: Q4 2007

Mobile	AT&T Wireless	27%
	Verizon Wireless	25%
	Sprint Nextel	18%
Broadband	AT&T	20%
	Comcast	19%
	Verizon	11%

Broadcasting market data

	2002	2003	2004	2005	2006	2007
TV revenues (£m)						
Subscription	22,104	23,373	26,046	28,528	30,577	33,266
Public funding	264	246	256	263	283	310
Advertising	27,737	28,930	30,155	30,564	32,928	33,063
Total	50,105	52,550	56,456	59,355	63,788	66,639
Radio revenues (£m)						
Subscription	12	62	192	506	886	1,204
Public funding	44	46	47	49	50	50
Advertising	9,446	9,548	9,791	9,826	9,850	9,346
Total	9,502	9,656	10,029	10,380	10,785	10,600
TV take-up (m)						
TV homes	106.7	108.2	109.6	110.2	111.6	112.2
Multichannel homes	87.1	88.8	91.9	97.1	101.2	106.1
Digital TV homes	39.1	44.5	50.8	60.2	68.4	78.3
Penetration in TV homes (%)						
Multichannel homes	82%	82%	84%	88%	91%	95%
Digital TV homes	37%	41%	46%	55%	61%	70%

Canada



Basic country data 2008

Size (km ²)	9,984,700
Population (m)	32.9
Households (m)	12.6
GDP (£bn)	663
GDP per capita (£)	20,126

Telecoms market data

	2004	2005	2006	2007
Revenues (£m)				
Fixed-line	6,148	5,935	5,740	5,465
Mobile	4,411	5,126	5,907	6,734
Internet	1,315	1,526	1,750	2,018
Total	11,873	12,587	13,397	14,218
Take-up (m)				
Fixed-line	20.6	20.8	19.2	19.2
Mobile subscriptions	15.0	17.0	18.7	20.3
Broadband connections	5.4	6.4	7.5	8.4
Penetration (%)				
Fixed-line (individuals)	64%	64%	59%	58%
Mobile (individuals)	47%	53%	57%	62%
Broadband (households)	45%	53%	60%	67%

Largest telecoms operators: Q4 2007

Mobile	Rogers Wireless	36%
	Bell Mobility	31%
	Telus Mobility	28%
Broadband	Bell Canada	24%
	Rogers	18%
	Telus	18%

Broadcasting market data

	2002	2003	2004	2005	2006	2007
TV revenues (£m)						
Subscription	1,962	2,107	2,202	2,294	2,600	2,846
Public funding	391	436	434	436	468	458
Advertising	966	1,012	1,033	1,109	1,153	1,131
Total	3,319	3,556	3,669	3,839	4,221	4,435
Radio revenues (£m)						
Subscription					12	58
Public funding	140	140	145	150	158	158
Advertising	476	544	562	569	600	628
Total	616	684	707	719	770	844
TV take-up (m)						
TV homes	11.8	11.9	11.9	12.2	12.2	12.4
Multichannel homes	9.7	10.0	10.2	10.7	11.1	11.6
Digital TV homes	3.3	3.9	4.2	4.8	5.7	6.6
Penetration in TV homes (%)						
Multichannel homes	82%	84%	86%	87%	91%	94%
Digital TV homes	28%	33%	35%	39%	47%	53%

Japan



Basic Country data 2007

Size (km ²)	377,900
Population (m)	127.4
Households (m)	49.5
GDP (£bn)	2,187
GDP per capita (£)	17,165

Telecoms market data

	2004	2005	2006	2007
Revenues (£m)				
Fixed-line	16,683	16,233	15,664	15,243
Mobile	30,347	30,158	30,722	30,616
Internet	2,462	3,221	3,891	4,534
Total	49,492	49,612	50,277	50,393
Take-up (m)				
Fixed-line	69.6	67.4	63.8	60.4
Mobile subscriptions	85.5	90.2	94.9	100.5
Broadband connections	18.6	22.4	25.8	28.3
Penetration (%)				
Fixed-line (individuals)	55%	53%	50%	47%
Mobile (individuals)	67%	71%	75%	79%
Broadband (households)	39%	46%	53%	57%

Largest telecoms operators: Q4 2007

Mobile	NTT DoCoMo	53%
	KDDI	29%
	Softbank	18%
Broadband	NTT	46%
	Softbank	18%
	KDDI	8%

Broadcasting market data

	2002	2003	2004	2005	2006	2007
TV revenues (£m)						
Subscription	3,260	4,020	4,564	5,156	5,271	6,072
Public funding	3,007	3,033	3,044	2,998	3,058	3,158
Advertising	8,937	8,802	8,882	9,134	8,664	8,480
Total	15,205	15,855	16,489	17,288	16,992	17,711
Radio revenues (£m)						
Public funding	831	834	884	936	959	974
Advertising	789	767	762	754	740	712
Total	1,620	1,601	1,646	1,690	1,698	1,686
TV take-up (m)						
TV homes	47.5	47.9	48.0	48.0	48.1	48.1
Multichannel homes	30.3	33.3	38.4	41.5	43.3	45.8
Digital TV homes	7.9	12.2	18.5	24.8	27.3	31.4
Penetration in TV homes (%)						
Multichannel homes	64%	70%	80%	86%	90%	95%
Digital TV homes	17%	25%	38%	52%	57%	65%