Telecommunications market data tables Q2 2015

1 – Market monitor

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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.

Please note that this update includes restated revenue figures for 'other' fixed providers. This is due to Ofcom revising its revenue estimates for those fixed operators that do not submit quarterly data to Ofcom.

Fixed voice services

- Total UK fixed line voice retail revenues were £2.1bn in Q2 2015, £25m (1.2%) less than in the previous quarter and a £7m (0.3%) decrease compared to Q2 2014. BT's share of these revenues was 44.0%, 0.9 percentage points less than it had been a year previously.
- Access revenues accounted for 72.1% of the total retail fixed voice revenue in Q2 2015, a 3.2 percentage point increase compared to a year previously.
- The total number of fixed exchange lines (including PSTN lines and ISDN channels) was 33.6 million at the end of Q2 2015, an increase of 209,000 (0.6%) compared to a year previously.
- UK fixed lines generated 17.7 billion minutes of outgoing calls in Q2 2015, a decrease of 1.7 billion minutes (8.9%) compared to the previous quarter and a 2.5 billion minute (12.2%) fall compared to Q2 2014.

Fixed broadband

- There were 24.2 million fixed broadband connections at the end of Q2 2015, 955,000 (4.1%) more than there had been a year previously. BT's retail share of these connections was 32.3% at the end of Q2 2015, a 0.2 percentage point increase compared to a year previously.
- Of these connections, 4.6 million (19.0%) were classified as being 'other inc. FTTx' (almost all of which are fibre broadband connections), an increase of 5.9 percentage points compared to Q2 2014.

Mobile services

- Mobile telephony services generated £3.8bn in retail revenues in Q2 2015, a £40m (1.1%) increase from the previous quarter and a £36m (0.9%) decrease compared to Q2 2014.
- Total outgoing mobile call volumes were 35.8 billion minutes in Q2 2015, an increase of 0.7 billion minutes (2.1%) since the previous quarter and of 1.5 billion minutes (4.2%) since Q2 2014.
- The total number of outgoing SMS and MMS messages was 25.7 billion in Q2 2015, a decrease of 76 million messages (0.3%) compared to the previous quarter and 2.2 billion messages (7.8%) compared to Q2 2014.
- The number of active mobile subscriptions increased by 2.5 million (3.1%) to 84.7 million compared to Q2 2014. The number of dedicated mobile broadband subscriptions (excluding M2M) was 5.3 million in Q2 2015, an increase of 0.4 million (7.4%) compared to a year previously.

2. Fixed telecoms market data tables

Q2 2015 (April to June 2015)

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

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

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2013	8,613	3,903	1,021	3,689	45.3%
2014	8,386	3,798	898	3,689	45.3%
2014 Q2	2,076	933	225	918	44.9%
2014 Q3	2,081	934	221	926	44.9%
2014 Q4	2,086	937	220	930	44.9%
2015 Q1	2,094	931	220	943	44.5%
2015 Q2	2,069	911	225	934	44.0%
Access					
2013	5,714	2,572	703	2,439	45.0%
2014	5,801	2,519	632	2,650	43.4%
2014 Q2	1,431	617	159	654	43.2%
2014 Q3	1,438	613	155	670	42.6%
2014 Q4	1,463	620	156	687	42.3%
2015 Q1	1,492	621	160	711	41.6%
2015 Q2	1,491	613	169	709	41.1%
Calls[1]					
2013	2,899	1,331	318	1,250	45.9%
2014	2,584	1,279	266	1,039	49.5%
2014 Q2	645	315	66	264	48.9%
2014 Q3	643	320	67	256	49.8%
2014 Q4	623	317	63	243	50.9%
2015 Q1	602	310	60	232	51.5%
2015 Q2	578	298	56	224	51.6%

Excludes VAT; [1] Revenue figures are not intended to include subscription revenues for 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
2013	33,437	13,834	4,751	14,851	41.4%
2014	33,537	13,243	4,737	15,557	39.5%
2014 Q2	33,376	13,535	4,732	15,109	40.6%
2014 Q3	33,358	13,373	4,723	15,261	40.1%
2014 Q4	33,537	13,243	4,737	15,557	39.5%
2015 Q1	33,528	13,115	4,699	15,714	39.1%
2015 Q2	33,585	12,990	4,709	15,887	38.7%

Table 3

Summary of call volumes by operator (millions of minutes)

	All Operators	BT[1]	Virgin Media	Other Direct Access	Other Indirect Access	BT share
2013	91,465	35,646	11,199	25,717	18,903	39.0%
2014	80,329	31,259	10,155	24,648	14,267	38.9%
2014 Q2	20,191	7,880	2,541	6,136	3,634	39.0%
2014 Q3	19,803	7,787	2,507	6,091	3,418	39.3%
2014 Q4	19,439	7,678	2,433	6,101	3,227	39.5%
2015 Q1	19,454	7,605	2,368	6,307	3,174	39.1%
2015 Q2	17,730	7,026	2,155	5,742	2,807	39.6%

Table 4

Summary of call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2013	2,899	906	271	897	824
2014	2,584	783	235	763	803
2014 Q2	645	194	59	189	204
2014 Q3	643	192	58	191	202
2014 Q4	623	191	56	181	195
2015 Q1	602	183	54	172	193
2015 Q2	578	165	53	166	194

Excludes VAT; [1] Includes freephone, special services, premium rate, directory enquiries and all other call types. Figures are not intended to include subscription revenues for 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						
2013	60,857	23,711	8,145	16,920	12,081	39.0%
2014	54,119	21,165	7,539	16,116	9,299	39.1%
2014 Q2	13,557	5,340	1,875	4,013	2,329	39.4%
2014 Q3	13,283	5,242	1,857	3,971	2,214	39.5%
2014 Q4	13,186	5,237	1,832	3,983	2,135	39.7%
2015 Q1	13,110	5,155	1,788	4,119	2,049	39.3%
2015 Q2	11,787	4,708	1,632	3,652	1,794	39.9%
International calls						
2013	4,926	979	257	2,598	1,092	19.9%
2014	4,343	883	227	2,441	792	20.3%
2014 Q2	1,089	225	57	602	205	20.7%
2014 Q3	1,062	218	55	604	184	20.5%
2014 Q4	1,060	219	55	603	183	20.7%
2015 Q1	1,083	212	54	637	181	19.6%
2015 Q2	988	200	50	573	165	20.2%
Calls to mobiles						
2013	8,374	3,148	920	1,862	2,444	37.6%
2014	7,267	2,899	778	1,744	1,847	39.9%
2014 Q2	1,840	740	195	434	472	40.2%
2014 Q3	1,824	740	195	442	448	40.6%
2014 Q4	1,754	713	191	440	410	40.6%
2015 Q1	1,740	703	185	448	404	40.4%
2015 Q2	1,647	675	177	409	386	41.0%
Other calls[1]						
2013	17,309	7,808	1,877	4,337	3,286	45.1%
2014	14,600	6,312	1,611	4,348	2,329	43.2%
2014 Q2	3,705	1,575	414	1,088	628	42.5%
2014 Q3	3,633	1,587	400	1,074	572	43.7%
2014 Q4	3,439	1,509	355	1,076	499	43.9%
2015 Q1	3,521	1,535	341	1,104	541	43.6%
2015 Q2	3,308	1,443	296	1,108	461	43.6%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types.

Table 6
Summary of residential network access & call revenues by operator (£millions)

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2013	5,900	2,541	937	2,423	43.1%
2014	5,907	2,534	822	2,551	42.9%
2014 Q2	1,466	626	207	633	42.7%
2014 Q3	1,470	621	202	647	42.3%
2014 Q4	1,482	624	201	657	42.1%
2015 Q1	1,517	635	200	682	41.8%
2015 Q2	1,498	619	206	673	41.3%
Access					
2013	3,964	1,589	668	1,707	40.1%
2014	4,148	1,602	599	1,947	38.6%
2014 Q2	1,025	394	151	480	38.4%
2014 Q3	1,033	389	147	497	37.7%
2014 Q4	1,055	392	148	515	37.2%
2015 Q1	1,104	406	152	547	36.7%
2015 Q2	1,105	399	160	546	36.1%
Calls[1]					
2013	1,936	952	269	715	49.2%
2014	1,759	932	222	605	53.0%
2014 Q2	442	232	56	154	52.6%
2014 Q3	437	232	55	150	53.0%
2014 Q4	427	232	53	142	54.4%
2015 Q1	413	229	49	135	55.5%
2015 Q2	392	220	46	126	56.1%

Excludes VAT; [1] Revenue figures are not intended to include subscription revenues for 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
2013	24,970	9,957	4,245	10,768	39.9%
2014	25,549	9,694	4,245	11,609	37.9%
2014 Q2	25,144	9,839	4,235	11,071	39.1%
2014 Q3	25,287	9,754	4,226	11,308	38.6%
2014 Q4	25,549	9,694	4,245	11,609	37.9%
2015 Q1	25,659	9,633	4,215	11,810	37.5%
2015 Q2	25,792	9,577	4,227	11,989	37.1%

Table 8
Summary of residential call volumes by operator (millions of minutes)

	All Operators	BT[1]	Virgin Media	Other	BT share
2013	63,678	25,218	9,450	29,010	39.6%
2014	55,750	21,984	8,392	25,374	39.4%
2014 Q2	13,919	5,514	2,075	6,330	39.6%
2014 Q3	13,664	5,441	2,045	6,178	39.8%
2014 Q4	13,612	5,446	2,045	6,121	40.0%
2015 Q1	13,587	5,353	1,998	6,236	39.4%
2015 Q2	12,328	4,901	1,827	5,600	39.8%

Table 9

Summary of residential call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2013	1,936	673	155	488	620
2014	1,759	577	132	430	620
2014 Q2	442	142	33	109	157
2014 Q3	437	141	33	108	155
2014 Q4	427	142	32	104	150
2015 Q1	413	137	31	96	149
2015 Q2	392	122	31	94	146

Excludes VAT; [1] Includes freephone, special services, premium rate, directory enquiries and all other call types. Figures are not intended to include subscription revenues for 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					
2013	46,191	18,388	7,202	20,601	39.8%
2014	40,766	16,284	6,437	18,045	39.9%
2014 Q2	10,140	4,091	1,580	4,469	40.3%
2014 Q3	9,943	4,004	1,569	4,370	40.3%
2014 Q4	10,029	4,060	1,595	4,374	40.5%
2015 Q1	9,992	3,974	1,564	4,454	39.8%
2015 Q2	8,978	3,608	1,438	3,932	40.2%
International calls					
2013	3,455	622	221	2,612	18.0%
2014	3,015	548	203	2,264	18.2%
2014 Q2	758	140	51	567	18.5%
2014 Q3	724	133	49	542	18.4%
2014 Q4	738	138	50	550	18.7%
2015 Q1	759	126	48	585	16.6%
2015 Q2	687	119	45	523	17.3%
Calls to mobiles					
2013	3,351	1,326	445	1,580	39.6%
2014	2,940	1,187	434	1,319	40.4%
2014 Q2	746	303	109	334	40.6%
2014 Q3	738	304	108	326	41.2%
2014 Q4	721	296	108	317	41.0%
2015 Q1	698	279	101	318	40.0%
2015 Q2	675	271	97	307	40.2%
Other calls[1]					
2013	10,681	4,882	1,582	4,217	45.7%
2014	9,028	3,965	1,318	3,745	43.9%
2014 Q2	2,275	980	335	960	43.1%
2014 Q3	2,259	1,000	319	940	44.3%
2014 Q4	2,124	952	292	880	44.8%
2015 Q1	2,138	974	285	879	45.5%
2015 Q2	1,989	903	247	839	45.4%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types.

Table 11
Summary of business network access & call revenues by operator (£millions)

	All Operators	BT	Virgin Media	Other	BT share
Access & Calls[1]					
2013	2,681	1,330	84	1,266	49.6%
2014	2,453	1,239	77	1,138	50.5%
2014 Q2	604	301	18	285	49.8%
2014 Q3	604	305	20	279	50.5%
2014 Q4	597	305	19	273	51.1%
2015 Q1	571	290	20	261	50.8%
2015 Q2	566	286	18	261	50.6%
Access					
2013	1,750	983	35	732	56.2%
2014	1,654	917	33	703	55.5%
2014 Q2	406	224	8	174	55.0%
2014 Q3	405	224	8	173	55.2%
2014 Q4	408	227	8	172	55.8%
2015 Q1	388	216	8	164	55.6%
2015 Q2	386	214	8	163	55.5%
Calls[1]					
2013	931	347	49	535	37.3%
2014	799	322	43	434	40.2%
2014 Q2	198	77	10	110	39.1%
2014 Q3	198	81	11	106	41.1%
2014 Q4	189	78	10	101	41.1%
2015 Q1	183	75	12	97	40.8%
2015 Q2	180	72	10	98	40.1%

Excludes VAT; [1] Revenue figures are not intended to include subscription revenues for 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
2013	8,466	3,877	507	4,083	45.8%
2014	7,988	3,549	491	3,948	44.4%
2014 Q2	8,233	3,697	497	4,039	44.9%
2014 Q3	8,070	3,619	497	3,954	44.8%
2014 Q4	7,988	3,549	491	3,948	44.4%
2015 Q1	7,870	3,482	484	3,904	44.2%
2015 Q2	7,793	3,413	482	3,898	43.8%

Table 13

Summary of business call volumes by operator (millions of minutes)

	All Operators	BT[1]	Virgin Media	Other Direct Access	Other Indirect Access	BT share
2013	27,741	10,383	1,749	8,247	7,362	37.4%
2014	24,530	9,226	1,763	7,847	5,693	37.6%
2014 Q2	6,258	2,352	466	1,970	1,470	37.6%
2014 Q3	6,125	2,333	462	1,963	1,367	38.1%
2014 Q4	5,816	2,221	388	1,955	1,252	38.2%
2015 Q1	5,856	2,240	370	2,006	1,240	38.3%
2015 Q2	5,394	2,115	328	1,809	1,142	39.2%

Table 14

Summary of business call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2013	931	233	116	408	173
2014	799	207	102	333	157
2014 Q2	198	52	25	80	40
2014 Q3	198	51	25	83	40
2014 Q4	189	50	25	77	38
2015 Q1	183	46	23	77	38
2015 Q2	180	43	22	72	42

Excludes VAT; [1] Includes freephone, special services, premium rate, directory enquiries and all other call types. Figures are not intended to include subscription revenues for 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						
2013	14,666	5,323	943	4,586	3,813	36.3%
2014	13,354	4,882	1,102	4,360	3,009	36.6%
2014 Q2	3,415	1,248	295	1,105	768	36.5%
2014 Q3	3,340	1,238	288	1,087	727	37.1%
2014 Q4	3,159	1,178	237	1,069	675	37.3%
2015 Q1	3,117	1,180	224	1,092	622	37.9%
2015 Q2	2,809	1,100	194	930	584	39.2%
International calls						
2013	1,470	357	36	853	224	24.3%
2014	1,327	335	24	794	175	25.2%
2014 Q2	331	85	6	192	48	25.7%
2014 Q3	338	85	6	205	41	25.2%
2014 Q4	322	81	5	199	38	25.1%
2015 Q1	325	86	6	194	39	26.5%
2015 Q2	299	81	5	169	45	27.0%
Calls to mobiles						
2013	5,023	1,823	475	1,053	1,672	36.3%
2014	4,328	1,713	344	1,022	1,249	39.6%
2014 Q2	1,096	438	86	251	321	40.0%
2014 Q3	1,087	436	87	263	301	40.1%
2014 Q4	1,033	417	83	263	270	40.4%
2015 Q1	1,043	424	84	263	272	40.7%
2015 Q2	973	404	80	228	261	41.5%
Other calls*						
2013	6,582	2,880	295	1,755	1,652	43.8%
2014	5,521	2,296	293	1,672	1,260	41.6%
2014 Q2	1,416	581	79	423	333	41.0%
2014 Q3	1,361	574	81	408	298	42.2%
2014 Q4	1,302	545	63	425	269	41.8%
2015 Q1	1,371	550	56	458	307	40.1%
2015 Q2	1,314	530	49	482	253	40.3%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types.

Table 16

Summary of residential and small business broadband connections at end of quarter (000's)[1]

	Total	ADSL	Cable	Other (inc. FTTx)	BT retail share
2013	22,807	16,057	4,394	2,356	31.2%
2014	23,730	15,538	4,541	3,651	32.0%
2014 Q2	23,219	15,730	4,435	3,053	32.0%
2014 Q3	23,411	15,557	4,484	3,370	31.9%
2014 Q4	23,730	15,538	4,541	3,651	32.0%
2015 Q1	24,007	15,232	4,568	4,207	32.1%
2015 Q2	24,174	15,001	4,578	4,594	32.3%

3. Mobile telecoms market data tables

Q2 2015 (April to June 2015)

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 (£millions)

	Total	Access and bundled svcs	UK fixed calls	On-net mobile calls	Off-net mobile calls	Int'l calls	Other calls	SMS and MMS	Data services
2013	15,498	7,826	574	316	694	637	992	1,807	2,651
2014	15,242	8,332	486	375	518	598	901	1,298	2,734
2014 Q2	3,794	2,047	123	94	132	149	235	328	688
2014 Q3	3,839	2,078	123	93	130	152	228	324	711
2014 Q4	3,861	2,173	115	93	126	151	212	314	676
2015 Q1	3,718	1,635	104	82	109	138	1,040	192	419
2015 Q2	3,758	1,659	100	78	109	132	1,043	194	441

Note: Includes estimates where Ofcom does not receive data from providers; excludes revenues from interconnection.

Table 2
Call and message volumes by call type (billions 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 & MMS messages
2013	133.73	32.36	40.57	47.04	7.92	1.74	4.10	129.44
2014	137.36	32.07	39.29	51.59	6.98	1.72	5.71	109.61
2014 Q2	34.32	7.87	9.69	12.95	1.88	0.42	1.50	27.90
2014 Q3	34.17	7.97	9.42	12.90	1.81	0.57	1.51	27.02
2014 Q4	35.45	8.33	9.87	13.63	1.75	0.41	1.46	26.40
2015 Q1	35.04	8.24	9.72	13.65	1.65	0.36	1.41	25.80
2015 Q2	35.77	8.37	9.82	13.93	1.75	0.47	1.44	25.73

Note: Includes estimates where Ofcom does not receive data from providers.

Table 3
Subscriber numbers by type (millions)

	Conns during period	Total subs at end of period	Post-pay subs at end of period	Pre-pay subs at end of period	Net change during period	Proportion post-pay	Mobile b'band subs at end of period
2013	32.89	82.67	46.79	35.88	-0.49	56.6%	4.91
2014	32.06	83.66	49.34	34.32	0.99	59.0%	5.20
2014 Q2	7.86	82.18	47.96	34.22	0.10	58.4%	4.96
2014 Q3	8.46	83.03	48.64	34.39	0.85	58.6%	5.09
2014 Q4	8.41	83.66	49.34	34.32	0.63	59.0%	5.20
2015 Q1	7.25	83.48	49.75	33.72	-0.19	59.6%	5.20
2015 Q2	7.67	84.72	50.72	34.00	1.25	59.9%	5.33

Note: Includes estimates where Ofcom does not receive data from providers; excludes M2M connections.

Table 4
Average monthly retail revenue per subscriber (£ per month)

	All subscribers	Post-pay contract	Pre-pay
2013	15.60	24.38	5.38
2014	15.37	23.12	5.00
2014 Q2	15.40	23.15	4.94
2014 Q3	15.49	23.11	5.21
2014 Q4	15.44	23.03	5.09
2015 Q1	14.83	22.05	4.63
2015 Q2	14.89	22.09	4.64

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 (billions of minutes)

	All operators
2013	56.98
2014	52.89
2014 Q2	13.06
2014 Q3	13.23
2014 Q4	13.49
2015 Q1	13.09
2015 Q2	12.64

Note: Shows the number of call minutes terminating on mobile networks which originate on other networks