Telecommunications market data tables Q4 2013

1 – Market monitor

2 – Fixed telecoms market data tables

3 – Mobile telecoms market data tables

Published: **24 April 2014**

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 services

- UK fixed-line telephony services generated £2.1bn in retail revenues in Q4 2013, £31.7m (1.5%) less than in Q4 2012. Over the same period, BT's market share of these revenues increased by 1.0 percentage points to 47.0%.
- There were 33.4 million fixed lines at the end of Q4 2013, 186,000 (0.6%) more than a year previously and 194,000 (0.6%) up on the previous quarter.
- UK fixed lines generated 21.8 billion minutes of calls in Q4 2013, 3.2 billion minutes (12.7%) less than in Q4 2012.

Fixed broadband services

- There were 22.6 million UK residential and SME fixed broadband connections at the end of Q4 2013, 941,000 (4.3%) more than there had been a year previously.
- BT retail's share of these connections was 30.7% in Q4 2013, one percentage points higher than it was in Q4 2012.
- At the end of December 2013 there were 2.4 million 'Other' fixed broadband connections (almost all of which are fibre broadband connections) equivalent to 10.5% of the total. This was up from 1.1 million (5.1% of the total) a year previously.
- The number of cable broadband connections increased by 104,000 (2.4%) over the same period, while the total number of ADSL connections fell by 423,000 (2.6%) to 15.8 million.

Mobile voice and data services

- Estimated retail revenues generated by mobile telephony services fell by £95m (2.4%) to £3.9bn in the year to Q4 2013 and increased by £92m (2.4%) from the previous quarter.
- Outgoing mobile call volumes increased by 1.4 billion minutes (4.3%) to 34.3 billion minutes in the year to Q4 2013.
- Over the same period, total SMS and MMS message volumes fell by 11.2 billion messages (26.5%) to 31.1 billion messages.
- The number of active mobile subscribers fell by 350,000 (0.4%) to 83.1 million in the year to Q4 2013.
- The number of active dedicated mobile broadband subscriptions (excluding M2M connections) fell by 0.8% (41,000) to 4.9 million in Q4 2013. It also fell on an annual basis, down by 161,000 connections (3.2%).

2. Fixed telecoms market data tables

Q4 2013 (October to December 2013)

Table

1	Network access and call revenues by operator	**5**
2	Exchange line numbers by operator	**6**
3	Call volumes by operator	**6**
4	Call revenues by call type	**7**
5	Call volumes by call type and operator	**8**
6	Residential network access and call revenues by operator	**9**
7	Residential exchange line numbers by operator	**10**
8	Residential call volumes by operator	**10**
9	Residential call revenues by call type	**11**
10	Residential call volumes by call type and operator	**12**
11	Business network access and call revenues by operator	**13**
12	Business exchange lines by operator	**14**
13	Business call volumes by operator	**14**
14	Business call revenues by call type	**15**
15	Business call volumes by call type and operator	**16**
16	Broadband internet subscribers	**17**

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]					
2012	8,575	4,041	1,066	3,468	47.1%
2013	8,425	3,903	1,021	3,502	46.3%
2012 Q4	2,114	973	263	879	46.0%
2013 Q1	2,148	996	263	890	46.4%
2013 Q2	2,114	971	261	881	46.0%
2013 Q3	2,081	956	258	866	46.0%
2013 Q4	2,083	979	239	865	47.0%
Access					
2012	5,342	2,639	677	2,026	49.4%
2013	5,531	2,572	703	2,256	46.5%
2012 Q4	1,334	635	171	528	47.6%
2013 Q1	1,396	659	177	559	47.2%
2013 Q2	1,387	641	182	563	46.2%
2013 Q3	1,364	624	179	561	45.8%
2013 Q4	1,384	647	164	573	46.8%
Calls[1]					
2012	3,233	1,402	389	1,442	43.4%
2013	2,894	1,331	318	1,246	46.0%
2012 Q4	780	338	92	350	43.3%
2013 Q1	752	336	85	330	44.7%
2013 Q2	727	330	79	318	45.5%
2013 Q3	717	332	79	306	46.3%
2013 Q4	698	332	75	292	47.5%

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
2012	33,197	14,504	4,838	13,855	43.7%
2013	33,384	13,745	4,751	14,887	41.2%
2012 Q4	33,197	14,504	4,838	13,855	43.7%
2013 Q1	33,115	14,185	4,828	14,103	42.8%
2013 Q2	33,360	14,093	4,800	14,468	42.2%
2013 Q3	33,190	13,886	4,761	14,544	41.8%
2013 Q4	33,384	13,745	4,751	14,887	41.2%

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
2012	103,061	39,728	12,712	25,837	24,784	38.5%
2013	91,872	35,646	11,199	25,584	19,442	38.8%
2012 Q4	25,030	9,625	3,081	6,613	5,712	38.5%
2013 Q1	24,816	9,753	3,059	6,594	5,409	39.3%
2013 Q2	23,141	9,078	2,698	6,304	5,061	39.2%
2013 Q3	22,072	8,537	2,663	6,282	4,591	38.7%
2013 Q4	21,843	8,278	2,779	6,404	4,382	37.9%

Table 4

Summary of call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2012	3,233	987	329	1,031	887
2013	2,894	905	271	895	824
2012 Q4	780	243	78	243	216
2013 Q1	752	245	70	230	207
2013 Q2	727	224	69	227	207
2013 Q3	717	220	67	224	206
2013 Q4	698	215	65	214	204

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						
2012	68,995	27,162	9,387	17,239	15,208	39.4%
2013	60,790	23,711	8,145	16,856	12,077	39.0%
2012 Q4	16,803	6,607	2,293	4,362	3,540	39.3%
2013 Q1	16,548	6,519	2,289	4,355	3,386	39.4%
2013 Q2	15,310	6,013	1,943	4,192	3,163	39.3%
2013 Q3	14,374	5,580	1,862	4,112	2,820	38.8%
2013 Q4	14,557	5,599	2,051	4,198	2,709	38.5%
International calls						
2012	5,848	1,176	275	2,626	1,771	20.1%
2013	4,894	979	257	2,569	1,088	20.0%
2012 Q4	1,369	283	68	673	345	20.7%
2013 Q1	1,282	260	67	647	308	20.3%
2013 Q2	1,256	252	65	648	291	20.1%
2013 Q3	1,188	235	62	638	253	19.8%
2013 Q4	1,167	232	63	636	237	19.9%
Calls to mobiles						
2012	9,387	3,622	801	1,860	3,105	38.6%
2013	8,368	3,148	920	1,856	2,444	37.6%
2012 Q4	2,260	864	196	484	717	38.2%
2013 Q1	2,173	838	196	467	672	38.6%
2013 Q2	2,140	817	219	468	636	38.2%
2013 Q3	2,127	763	296	477	590	35.9%
2013 Q4	1,927	730	209	444	544	37.9%
Other calls[1]						
2012	18,830	7,768	2,249	4,113	4,700	41.3%
2013	17,821	7,808	1,877	4,303	3,833	43.8%
2012 Q4	4,599	1,871	524	1,094	1,110	40.7%
2013 Q1	4,812	2,136	507	1,126	1,043	44.4%
2013 Q2	4,434	1,996	471	996	971	45.0%
2013 Q3	4,383	1,959	443	1,054	928	44.7%
2013 Q4	4,191	1,717	456	1,127	892	41.0%

[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]					
2012	5,846	2,603	976	2,267	44.5%
2013	5,890	2,541	937	2,413	43.1%
2012 Q4	1,456	625	243	588	42.9%
2013 Q1	1,499	649	241	609	43.3%
2013 Q2	1,477	629	241	607	42.6%
2013 Q3	1,466	631	236	598	43.0%
2013 Q4	1,448	631	218	598	43.6%
Access					
2012	3,703	1,591	639	1,473	43.0%
2013	3,958	1,589	668	1,701	40.1%
2012 Q4	933	379	163	391	40.6%
2013 Q1	993	404	168	420	40.7%
2013 Q2	995	395	174	426	39.7%
2013 Q3	989	395	170	424	40.0%
2013 Q4	980	393	155	431	40.1%
Calls[1]					
2012	2,142	1,012	337	794	47.2%
2013	1,932	952	269	711	49.3%
2012 Q4	523	247	80	197	47.1%
2013 Q1	506	245	73	189	48.3%
2013 Q2	482	234	67	181	48.6%
2013 Q3	476	235	66	175	49.4%
2013 Q4	468	238	63	167	50.9%

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
2012	24,444	10,341	4,322	9,781	42.3%
2013	25,038	9,957	4,245	10,836	39.8%
2012 Q4	24,444	10,341	4,322	9,781	42.3%
2013 Q1	24,593	10,184	4,316	10,094	41.4%
2013 Q2	24,650	10,034	4,294	10,322	40.7%
2013 Q3	24,765	10,028	4,258	10,479	40.5%
2013 Q4	25,038	9,957	4,245	10,836	39.8%

Table 8

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

	All Operators	BT[1]	Virgin Media	Other	BT share
2012	71,456	28,310	10,614	32,532	39.6%
2013	63,586	25,218	9,450	28,918	39.7%
2012 Q4	17,358	6,896	2,566	7,896	39.7%
2013 Q1	17,303	6,934	2,547	7,822	40.1%
2013 Q2	15,924	6,371	2,333	7,220	40.0%
2013 Q3	15,228	5,995	2,271	6,962	39.4%
2013 Q4	15,133	5,918	2,299	6,916	39.1%

Table 9

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2012	2,142	722	197	565	658
2013	1,932	672	155	486	619
2012 Q4	523	181	48	135	160
2013 Q1	506	184	41	126	155
2013 Q2	482	166	39	122	155
2013 Q3	476	164	38	121	154
2013 Q4	468	160	36	117	155

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					
2012	51,955	21,051	8,062	22,842	40.5%
2013	46,125	18,388	7,202	20,535	39.9%
2012 Q4	12,736	5,163	1,965	5,608	40.5%
2013 Q1	12,598	5,084	1,963	5,551	40.4%
2013 Q2	11,610	4,626	1,774	5,210	39.8%
2013 Q3	10,895	4,300	1,715	4,880	39.5%
2013 Q4	11,023	4,378	1,750	4,895	39.7%
International calls					
2012	4,107	743	239	3,125	18.1%
2013	3,453	622	221	2,610	18.0%
2012 Q4	978	180	60	738	18.4%
2013 Q1	920	166	58	696	18.0%
2013 Q2	881	160	55	666	18.2%
2013 Q3	830	148	53	629	17.8%
2013 Q4	822	148	55	619	18.0%
Calls to mobiles					
2012	3,899	1,598	453	1,848	41.0%
2013	3,345	1,326	445	1,574	39.6%
2012 Q4	941	380	110	451	40.4%
2013 Q1	877	351	108	418	40.0%
2013 Q2	857	342	110	405	39.9%
2013 Q3	826	323	113	390	39.1%
2013 Q4	785	310	114	361	39.5%
Other calls[1]					
2012	11,495	4,918	1,860	4,717	42.8%
2013	10,662	4,882	1,582	4,198	45.8%
2012 Q4	2,702	1,173	431	1,098	43.4%
2013 Q1	2,907	1,333	418	1,156	45.9%
2013 Q2	2,576	1,243	394	939	48.3%
2013 Q3	2,677	1,224	390	1,063	45.7%
2013 Q4	2,502	1,082	380	1,040	43.2%

[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]					
2012	2,693	1,402	90	1,201	52.1%
2013	2,504	1,330	84	1,090	53.1%
2012 Q4	649	338	20	291	52.1%
2013 Q1	641	339	21	281	52.8%
2013 Q2	628	334	20	274	53.2%
2013 Q3	607	317	22	268	52.3%
2013 Q4	627	340	20	267	54.2%
Access					
2012	1,639	1,048	38	553	64.0%
2013	1,573	983	35	555	62.5%
2012 Q4	401	256	8	137	63.8%
2013 Q1	403	255	9	139	63.2%
2013 Q2	392	246	9	137	62.8%
2013 Q3	374	229	9	137	61.1%
2013 Q4	404	254	9	142	62.8%
Calls[1]					
2012	1,055	354	52	648	33.6%
2013	930	347	49	534	37.3%
2012 Q4	248	82	12	153	33.2%
2013 Q1	238	84	13	142	35.3%
2013 Q2	237	88	12	137	37.2%
2013 Q3	233	89	13	131	38.1%
2013 Q4	223	86	12	125	38.6%

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
2012	8,754	4,162	517	4,074	47.6%
2013	8,346	3,788	507	4,052	45.4%
2012 Q4	8,754	4,162	517	4,074	47.6%
2013 Q1	8,522	4,001	512	4,009	47.0%
2013 Q2	8,711	4,059	506	4,146	46.6%
2013 Q3	8,425	3,858	503	4,065	45.8%
2013 Q4	8,346	3,788	507	4,052	45.4%

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
2012	31,543	11,354	2,098	8,486	9,605	36.0%
2013	28,240	10,383	1,749	8,201	7,906	36.8%
2012 Q4	7,656	2,712	515	2,208	2,221	35.4%
2013 Q1	7,498	2,804	512	2,086	2,096	37.4%
2013 Q2	7,217	2,707	365	2,120	2,025	37.5%
2013 Q3	6,830	2,527	392	1,979	1,932	37.0%
2013 Q4	6,694	2,345	480	2,016	1,853	35.0%

Table 14

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2012	1,055	265	132	466	193
2013	930	233	116	408	173
2012 Q4	248	62	30	108	48
2013 Q1	238	62	29	103	44
2013 Q2	237	58	30	105	44
2013 Q3	233	57	29	103	44
2013 Q4	223	56	29	97	41

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						
2012	17,041	6,110	1,325	4,893	4,713	35.9%
2013	14,664	5,323	943	4,586	3,812	36.3%
2012 Q4	4,065	1,443	328	1,210	1,084	35.5%
2013 Q1	3,951	1,435	326	1,165	1,025	36.3%
2013 Q2	3,701	1,387	169	1,168	977	37.5%
2013 Q3	3,479	1,280	147	1,126	926	36.8%
2013 Q4	3,534	1,221	301	1,128	884	34.6%
International calls						
2012	1,742	433	36	878	394	24.9%
2013	1,440	357	36	824	223	24.8%
2012 Q4	391	103	8	218	62	26.4%
2013 Q1	362	94	9	203	56	26.0%
2013 Q2	375	92	10	214	59	24.5%
2013 Q3	358	87	9	207	55	24.3%
2013 Q4	345	84	8	200	53	24.3%
Calls to mobiles						
2012	5,488	2,024	348	1,024	2,093	36.9%
2013	5,023	1,823	475	1,053	1,671	36.3%
2012 Q4	1,319	484	86	267	482	36.7%
2013 Q1	1,296	487	88	265	456	37.6%
2013 Q2	1,283	475	109	268	431	37.0%
2013 Q3	1,302	441	183	274	403	33.9%
2013 Q4	1,142	420	95	246	380	36.8%
Other calls*						
2012	7,273	2,787	389	1,692	2,405	38.3%
2013	7,113	2,880	295	1,738	2,200	40.5%
2012 Q4	1,881	682	93	513	593	36.3%
2013 Q1	1,889	788	89	454	559	41.7%
2013 Q2	1,859	753	77	470	559	40.5%
2013 Q3	1,690	719	53	371	547	42.5%
2013 Q4	1,674	620	76	443	535	37.0%

[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	Non-LLU ADSL	LLU ADSL	Cable	Other (inc. FTTx)	BT retail share
2012	21,637	7,468	8,777	4,290	1,101	29.6%
2013	22,577	6,581	9,241	4,394	2,361	30.7%
2012 Q4	21,637	7,468	8,777	4,290	1,101	29.6%
2013 Q1	21,859	7,301	8,850	4,328	1,380	29.9%
2013 Q2	22,090	7,101	8,958	4,325	1,706	30.0%
2013 Q3	22,284	6,878	9,025	4,355	2,026	30.3%
2013 Q4	22,577	6,581	9,241	4,394	2,361	30.7%

[1] Figures exclude corporate broadband connections. Connection numbers have been adjusted to exclude corporate broadband based on Ofcom estimates.

3. Mobile telecoms market data tables

Q4 2013 (October to December 2013)

Table

1	Estimated retail revenues generated by mobile telephony	**18**
2	Call and message volumes by call type	**18**
3	Subscriber numbers by type	**19**
4	Average monthly retail revenue per subscriber	**19**
5	Interconnection call volumes	**20**

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
2012	15,905	6,376	639	420	924	594	2,027	2,420	2,506
2013	15,559	7,582	608	320	700	638	1,234	1,799	2,680
2012 Q4	4,017	1,647	155	94	208	160	501	602	649
2013 Q1	3,980	1,651	144	83	184	155	461	590	712
2013 Q2	3,826	1,938	142	84	178	160	256	421	647
2013 Q3	3,831	1,951	142	77	173	164	271	386	667
2013 Q4	3,923	2,041	180	76	165	160	245	402	654

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
2012	132.29	31.47	41.62	43.60	7.86	1.68	6.06	171.88
2013	134.10	32.43	39.75	47.19	7.93	1.74	5.06	128.60
2012 Q4	32.87	7.77	10.06	11.00	2.01	0.37	1.66	42.28
2013 Q1	33.33	8.13	10.17	11.35	2.10	0.39	1.20	34.66
2013 Q2	32.98	7.89	9.82	11.66	2.02	0.44	1.16	32.27
2013 Q3	33.48	8.00	9.81	11.77	1.96	0.53	1.40	30.59
2013 Q4	34.30	8.41	9.95	12.41	1.84	0.38	1.31	31.08

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
2012	34.15	83.40	43.54	39.86	1.02	52.2%	5.07
2013	32.89	83.05	46.92	36.14	-0.35	56.5%	4.91
2012 Q4	9.02	83.40	43.54	39.86	0.89	52.2%	5.07
2013 Q1	7.96	83.13	44.43	38.69	-0.27	53.5%	4.98
2013 Q2	8.06	82.70	45.21	37.49	-0.43	54.7%	4.92
2013 Q3	8.62	83.25	46.07	37.18	0.54	55.3%	4.95
2013 Q4	8.24	83.05	46.92	36.14	-0.19	56.5%	4.91

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
2012	16.13	26.09	5.92
2013	15.61	25.21	5.14
2012 Q4	16.14	25.69	5.85
2013 Q1	15.93	25.71	5.30
2013 Q2	15.38	24.80	5.23
2013 Q3	15.39	24.94	4.93
2013 Q4	15.72	25.38	5.08

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
2012	59.15
2013	56.98
2012 Q4	15.09
2013 Q1	15.06
2013 Q2	14.98
2013 Q3	13.53
2013 Q4	13.42