Telecommunications market data tables Q1 2016

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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 figures for ‘other’ fixed providers. This is due to Ofcom revising its estimates for those fixed operators that do not submit quarterly data to Ofcom.

Fixed voice services

- Total UK fixed line voice retail revenues remained fairly stable in Q1 2016, at £2.1bn. This represented an increase of £11m (0.5%) compared to Q1 2015. BT’s share of these revenues was 43.4%, 0.9 percentage points less than it had been a year previously.
- Access revenues accounted for 73.7% of total retail fixed voice revenue in Q1 2016, an increase of 2.8 percentage points compared to a year previously.
- UK fixed lines generated 17.4 billion minutes of outgoing calls in Q1 2016, 2.5 billion (12.5%) less than in Q1 2015.
- The total number of fixed exchange lines (including PSTN lines and ISDN channels) was 33.6 million at the end of Q1 2016, an increase of 103,000 (0.3%) compared to a year previously.

Fixed broadband

- There were 25.0 million fixed broadband connections at the end of Q1 2016, 947,000 (3.9%) more than there had been a year previously. BT’s retail share of these connections was 32.4%, a 0.3 percentage point increase compared to Q1 2015.
- Of these connections, 23.4% (5.8 million) were classified as being ‘other inc. FTTx’ (almost all of which are fibre broadband connections), an increase of 5.9 percentage points compared to a year previously.

Mobile services

- Mobile telephony services generated £3.8bn in retail revenues in Q1 2016, a £34m (0.9%) decrease compared to the previous quarter, but a £68m (1.8%) increase compared to Q1 2015.
- Outgoing mobile call volumes remained fairly stable in Q1 2016, at 36.8 billion minutes. This represented an increase of 1.8 billion minutes (5.1%) compared to a year previously.
- The total number of outgoing SMS and MMS messages was 24.1 billion in Q1 2016, a decrease of 1.2 billion messages (4.6%) compared to the previous quarter and a fall of 1.8 billion messages (6.8%) compared to a year previously.
- The number of active mobile subscribers increased by 0.4 million (0.5%) in the year to Q1 2016, to 83.9 million. Over the same period, the number of dedicated mobile broadband subscriptions (excluding M2M) increased by 0.3 million (5.8%) to 5.5 million.

2. Fixed telecoms market data tables

Q1 2016 (January to March 2016)

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]					
2014	8,438	3,798	898	3,742	45.0%
2015	8,391	3,703	882	3,806	44.1%
2015 Q1	2,105	931	220	954	44.2%
2015 Q2	2,077	911	225	942	43.9%
2015 Q3	2,094	921	219	955	44.0%
2015 Q4	2,115	941	218	956	44.5%
2016 Q1	2,116	918	210	989	43.4%
Access					
2014	5,801	2,519	632	2,650	43.4%
2015	6,019	2,469	660	2,891	41.0%
2015 Q1	1,492	621	160	711	41.6%
2015 Q2	1,494	613	169	713	41.0%
2015 Q3	1,499	609	165	725	40.6%
2015 Q4	1,534	626	166	742	40.8%
2016 Q1	1,560	616	161	783	39.5%
Calls[1]					
2014	2,637	1,279	266	1,092	48.5%
2015	2,371	1,234	222	915	52.0%
2015 Q1	613	310	60	243	50.6%
2015 Q2	583	298	56	229	51.1%
2015 Q3	595	311	54	229	52.4%
2015 Q4	581	315	52	214	54.2%
2016 Q1	556	302	49	205	54.3%

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
2014	33,537	13,243	4,737	15,557	39.5%
2015	33,704	12,818	4,744	16,142	38.0%
2015 Q1	33,528	13,115	4,699	15,714	39.1%
2015 Q2	33,617	12,990	4,709	15,919	38.6%
2015 Q3	33,596	12,894	4,707	15,995	38.4%
2015 Q4	33,704	12,818	4,744	16,142	38.0%
2016 Q1	33,632	12,713	4,776	16,143	37.8%

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
2014	82,229	31,259	10,155	25,075	15,739	38.0%
2015	73,921	28,389	8,737	23,355	13,440	38.4%
2015 Q1	19,873	7,605	2,368	6,288	3,612	38.3%
2015 Q2	18,324	7,026	2,155	5,881	3,262	38.3%
2015 Q3	18,025	6,961	2,115	5,648	3,301	38.6%
2015 Q4	17,699	6,797	2,099	5,538	3,266	38.4%
2016 Q1	17,389	6,705	2,066	5,369	3,250	38.6%

Table 4

Summary of call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2014	2,637	784	235	763	854
2015	2,371	694	215	660	802
2015 Q1	613	185	55	172	200
2015 Q2	583	168	53	165	197
2015 Q3	595	167	53	166	208
2015 Q4	581	174	53	157	198
2016 Q1	556	165	51	139	201

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						
2014	55,159	21,165	7,539	16,296	10,159	38.4%
2015	49,327	19,131	6,651	14,917	8,628	38.8%
2015 Q1	13,364	5,155	1,788	4,108	2,313	38.6%
2015 Q2	12,224	4,708	1,632	3,796	2,088	38.5%
2015 Q3	11,894	4,631	1,607	3,543	2,114	38.9%
2015 Q4	11,845	4,637	1,624	3,470	2,113	39.1%
2016 Q1	11,599	4,562	1,599	3,343	2,096	39.3%
International calls						
2014	4,417	883	227	2,467	840	20.0%
2015	4,039	789	206	2,312	732	19.5%
2015 Q1	1,095	212	54	637	192	19.4%
2015 Q2	1,013	200	50	589	174	19.7%
2015 Q3	973	190	51	546	186	19.5%
2015 Q4	958	187	51	540	180	19.5%
2016 Q1	900	181	50	501	168	20.1%
Calls to mobiles						
2014	7,659	2,899	778	1,818	2,164	37.9%
2015	7,089	2,703	720	1,739	1,927	38.1%
2015 Q1	1,831	703	185	444	500	38.4%
2015 Q2	1,766	675	177	431	483	38.2%
2015 Q3	1,766	675	180	433	478	38.2%
2015 Q4	1,726	650	178	431	467	37.7%
2016 Q1	1,744	644	172	450	478	36.9%
Other calls[1]						
2014	14,993	6,312	1,611	4,494	2,576	42.1%
2015	13,466	5,766	1,160	4,386	2,154	42.8%
2015 Q1	3,583	1,535	341	1,100	607	42.8%
2015 Q2	3,321	1,443	296	1,065	517	43.4%
2015 Q3	3,391	1,465	277	1,126	523	43.2%
2015 Q4	3,170	1,323	246	1,096	506	41.7%
2016 Q1	3,146	1,318	245	1,075	507	41.9%

[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]					
2014	5,907	2,534	822	2,551	42.9%
2015	6,056	2,514	807	2,735	41.5%
2015 Q1	1,517	635	200	682	41.8%
2015 Q2	1,499	619	206	674	41.3%
2015 Q3	1,507	619	201	687	41.1%
2015 Q4	1,533	642	199	693	41.9%
2016 Q1	1,547	631	191	725	40.8%
Access					
2014	4,148	1,602	599	1,947	38.6%
2015	4,462	1,608	624	2,230	36.0%
2015 Q1	1,104	406	152	547	36.7%
2015 Q2	1,107	399	160	548	36.0%
2015 Q3	1,109	393	157	559	35.4%
2015 Q4	1,142	411	155	576	36.0%
2016 Q1	1,184	412	151	622	34.8%
Calls[1]					
2014	1,759	932	222	605	53.0%
2015	1,594	906	183	505	56.8%
2015 Q1	413	229	49	135	55.5%
2015 Q2	392	220	46	126	56.1%
2015 Q3	398	226	44	127	56.8%
2015 Q4	391	231	44	116	59.1%
2016 Q1	363	219	40	103	60.4%

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
2014	25,549	9,694	4,245	11,609	37.9%
2015	26,058	9,528	4,277	12,253	36.6%
2015 Q1	25,659	9,633	4,215	11,810	37.5%
2015 Q2	25,791	9,577	4,227	11,988	37.1%
2015 Q3	25,881	9,522	4,234	12,125	36.8%
2015 Q4	26,058	9,528	4,277	12,253	36.6%
2016 Q1	26,091	9,510	4,326	12,255	36.4%

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

	All Operators	BT[1]	Virgin Media	Other	BT share
2014	55,750	21,984	8,392	25,374	39.4%
2015	49,986	19,847	7,382	22,757	39.7%
2015 Q1	13,587	5,353	1,998	6,236	39.4%
2015 Q2	12,328	4,901	1,827	5,600	39.8%
2015 Q3	12,078	4,815	1,778	5,485	39.9%
2015 Q4	11,992	4,778	1,779	5,435	39.8%
2016 Q1	11,750	4,668	1,746	5,336	39.7%

Table 9

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2014	1,759	577	132	430	620
2015	1,594	506	123	369	595
2015 Q1	413	137	31	96	149
2015 Q2	392	122	31	94	146
2015 Q3	398	121	30	93	153
2015 Q4	391	126	32	86	147
2016 Q1	363	117	30	71	145

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					
2014	40,766	16,284	6,437	18,045	39.9%
2015	36,501	14,696	5,851	15,954	40.3%
2015 Q1	9,992	3,974	1,564	4,454	39.8%
2015 Q2	8,978	3,608	1,438	3,932	40.2%
2015 Q3	8,728	3,526	1,412	3,790	40.4%
2015 Q4	8,803	3,588	1,437	3,778	40.8%
2016 Q1	8,580	3,504	1,411	3,665	40.8%
International calls					
2014	3,015	548	203	2,264	18.2%
2015	2,750	468	182	2,100	17.0%
2015 Q1	759	126	48	585	16.6%
2015 Q2	687	119	45	523	17.3%
2015 Q3	648	111	44	493	17.1%
2015 Q4	657	112	45	500	17.1%
2016 Q1	611	106	44	461	17.3%
Calls to mobiles					
2014	2,940	1,187	434	1,319	40.4%
2015	2,738	1,084	388	1,266	39.6%
2015 Q1	698	279	101	318	40.0%
2015 Q2	675	271	97	307	40.2%
2015 Q3	679	270	95	314	39.8%
2015 Q4	687	264	95	328	38.4%
2016 Q1	686	250	91	345	36.5%
Other calls[1]					
2014	9,028	3,965	1,318	3,745	43.9%
2015	7,996	3,599	961	3,436	45.0%
2015 Q1	2,138	974	285	879	45.5%
2015 Q2	1,989	903	247	839	45.4%
2015 Q3	2,023	908	227	888	44.9%
2015 Q4	1,845	814	202	829	44.1%
2016 Q1	1,873	808	200	865	43.1%

[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]					
2014	2,506	1,239	77	1,190	49.4%
2015	2,314	1,168	75	1,070	50.5%
2015 Q1	582	290	20	272	49.9%
2015 Q2	572	286	18	267	50.0%
2015 Q3	583	297	18	268	51.0%
2015 Q4	577	295	19	263	51.0%
2016 Q1	566	283	18	264	50.1%
Access					
2014	1,654	917	33	703	55.5%
2015	1,557	861	36	660	55.3%
2015 Q1	388	216	8	164	55.6%
2015 Q2	387	214	8	165	55.3%
2015 Q3	390	217	8	166	55.5%
2015 Q4	391	215	11	166	55.0%
2016 Q1	376	204	10	162	54.3%
Calls[1]					
2014	852	322	43	487	37.8%
2015	757	307	39	410	40.6%
2015 Q1	194	75	12	108	38.6%
2015 Q2	184	72	10	103	39.1%
2015 Q3	192	81	9	102	42.0%
2015 Q4	186	80	9	98	42.7%
2016 Q1	190	79	8	103	41.7%

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
2014	7,988	3,549	491	3,948	44.4%
2015	7,647	3,291	467	3,889	43.0%
2015 Q1	7,870	3,482	484	3,904	44.2%
2015 Q2	7,826	3,413	482	3,931	43.6%
2015 Q3	7,715	3,373	473	3,870	43.7%
2015 Q4	7,647	3,291	467	3,889	43.0%
2016 Q1	7,541	3,203	450	3,888	42.5%

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
2014	26,430	9,226	1,763	8,275	7,166	34.9%
2015	23,918	8,504	1,355	7,657	6,402	35.6%
2015 Q1	6,273	2,240	370	1,987	1,676	35.7%
2015 Q2	5,990	2,115	328	1,948	1,599	35.3%
2015 Q3	5,953	2,137	337	1,894	1,585	35.9%
2015 Q4	5,702	2,012	320	1,828	1,543	35.3%
2016 Q1	5,664	2,031	320	1,744	1,569	35.9%

Table 14

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2014	852	208	103	333	208
2015	757	188	91	293	185
2015 Q1	194	48	24	77	44
2015 Q2	184	46	23	71	44
2015 Q3	192	46	23	73	50
2015 Q4	186	48	21	71	46
2016 Q1	190	48	21	69	53

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						
2014	14,394	4,882	1,102	4,516	3,894	33.9%
2015	12,829	4,434	800	4,137	3,459	34.6%
2015 Q1	3,369	1,180	224	1,081	885	35.0%
2015 Q2	3,250	1,100	194	1,074	882	33.8%
2015 Q3	3,169	1,105	195	1,018	852	34.9%
2015 Q4	3,041	1,049	187	964	840	34.5%
2016 Q1	3,011	1,058	188	913	852	35.1%
International calls						
2014	1,401	335	24	819	223	23.9%
2015	1,292	321	24	715	232	24.8%
2015 Q1	338	86	6	194	52	25.5%
2015 Q2	320	81	5	177	58	25.3%
2015 Q3	329	79	7	179	64	24.0%
2015 Q4	305	75	6	165	59	24.6%
2016 Q1	295	75	6	159	55	25.4%
Calls to mobiles						
2014	4,720	1,713	344	1,095	1,568	36.3%
2015	4,347	1,618	332	992	1,405	37.2%
2015 Q1	1,134	424	84	259	367	37.4%
2015 Q2	1,091	404	80	250	357	37.0%
2015 Q3	1,084	404	85	248	347	37.3%
2015 Q4	1,038	386	83	235	334	37.2%
2016 Q1	1,057	394	81	237	346	37.3%
Other calls*						
2014	5,915	2,296	293	1,845	1,481	38.8%
2015	5,449	2,131	199	1,812	1,307	39.1%
2015 Q1	1,432	550	56	454	373	38.4%
2015 Q2	1,327	530	49	447	302	39.9%
2015 Q3	1,371	549	50	449	323	40.0%
2015 Q4	1,318	502	44	463	310	38.1%
2016 Q1	1,301	504	45	436	316	38.7%

[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
2014	23,730	15,538	4,541	3,651	32.0%
2015	24,662	14,497	4,701	5,465	32.4%
2015 Q1	24,007	15,232	4,568	4,207	32.1%
2015 Q2	24,174	15,004	4,578	4,592	32.3%
2015 Q3	24,387	14,761	4,632	4,993	32.3%
2015 Q4	24,662	14,497	4,701	5,465	32.4%
2016 Q1	24,954	14,338	4,771	5,845	32.4%

3. Mobile telecoms market data tables

Q1 2016 (January to March 2016)

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
2014	15,242	8,332	486	375	518	598	901	1,298	2,734
2015	15,178	10,300	393	313	429	522	697	767	1,757
2015 Q1	3,735	2,517	104	82	109	138	175	192	419
2015 Q2	3,772	2,566	100	78	109	132	154	194	439
2015 Q3	3,835	2,584	97	77	107	124	197	191	457
2015 Q4	3,836	2,634	91	76	105	127	170	189	443
2016 Q1	3,802	2,669	82	69	95	124	154	177	431

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
2014	137.36	32.07	39.29	51.59	6.98	1.72	5.71	109.61
2015	142.63	33.16	39.48	55.99	6.49	1.91	5.60	101.47
2015 Q1	35.04	8.24	9.72	13.65	1.65	0.36	1.42	25.80
2015 Q2	35.78	8.37	9.82	13.93	1.75	0.47	1.45	25.73
2015 Q3	34.97	8.02	9.56	13.95	1.49	0.57	1.38	24.73
2015 Q4	36.84	8.52	10.39	14.47	1.60	0.50	1.35	25.21
2016 Q1	36.83	8.08	10.29	14.94	1.70	0.47	1.35	24.05

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
2014	32.13	83.66	49.34	34.32	0.99	59.0%	5.20
2015	31.18	84.73	51.38	33.35	1.07	60.6%	5.59
2015 Q1	7.34	83.48	49.75	33.72	-0.19	59.6%	5.20
2015 Q2	7.73	84.50	50.50	34.00	1.02	59.8%	5.36
2015 Q3	8.26	85.00	50.64	34.36	0.51	59.6%	5.56
2015 Q4	7.85	84.73	51.38	33.35	-0.27	60.6%	5.59
2016 Q1	6.90	83.88	52.03	31.85	-0.85	62.0%	5.50

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
2014	15.37	23.12	5.00
2015	15.00	22.11	4.75
2015 Q1	14.90	22.17	4.63
2015 Q2	14.97	22.19	4.64
2015 Q3	15.08	22.25	4.82
2015 Q4	15.07	21.85	4.91
2016 Q1	15.03	21.44	4.82

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
2014	52.89
2015	52.48
2015 Q1	13.00
2015 Q2	13.50
2015 Q3	12.94
2015 Q4	13.03
2016 Q1	13.49