Telecommunications market data tables Q4 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.

Fixed voice services

- Fixed voice services generated £2.1bn in Q4 2016, in line with the previous quarter and a £21m (1.0%) increase compared to a year previously. BT's share of these revenues (excluding EE) was 44.0%, a 0.5 percentage point fall compared to Q4 2015.
- There was a total of 33.5 million UK PSTN lines and ISDN channels at the end of 2016. This represented a year-on-year decrease of 211k (0.6%) and a decline of 74k (0.2%) compared to the previous quarter.
- UK landlines generated 15.6 billion minutes of outgoing calls in Q4 2016, a fall of 2.1 billion minutes (12.1%) compared to a year previously.

Fixed broadband

- There were 25.3 million UK fixed broadband connections at the end of 2016, a year-on-year increase of 542k (2.2%) and 216k (0.9%) more than in the previous quarter.
- BT's share of these lines (excluding EE) was 32.8%, an increase of 0.4 percentage points compared to Q4 2015.
- There were 6.8 million 'other (inc. FTTx)' fixed broadband lines, predominantly comprised of superfast fibre broadaband connections, at the end of 2016, a year-on-year increase of 1.2 million (22%). This represented 26.8% of the total, up from 22.5% a year previously.

Mobile services

- Mobile telephony services generated £3.9bn in retail revenues in Q4 2016, a £15m (0.4%) decrease from the previous quarter and a £30m (0.8%) increase compared to Q4 2015.
- Total outgoing mobile call volumes were 38.0 billion minutes in Q4 2016, an increase of 0.4 billion minutes (1.0%) since the previous quarter and up 1.2 billion minutes (3.2%) since Q4 2015.
- The total number of outgoing SMS and MMS messages was 23.7 billion in Q4 2016, down 0.3 billion (1.4%) on the previous quarter and down 1.5 billion messages (5.9%) compared to Q4 2015.
- The number of active mobile subscriptions (excluding M2M connections) decreased by 1.2 million (1.4%) to 83.5 million in the year to Q4 2016. Over the same period, the number of dedicated mobile broadband subscriptions (again, excluding M2M) dropped 0.6 million (11.0%) to 5.0 million.

2. Fixed telecoms market data tables

Q4 2016 (October to December 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 (exc. EE)	Virgin Media	Other	BT share (exc. EE)
Access & Calls[1]					
2015	8,391	3,703	882	3,806	44.1%
2016	8,522	3,753	835	3,934	44.0%
2015 Q4	2,115	941	218	956	44.5%
2016 Q1	2,116	918	210	989	43.4%
2016 Q2	2,135	936	209	989	43.9%
2016 Q3	2,135	959	207	969	44.9%
2016 Q4	2,136	940	209	986	44.0%
Access					
2015	6,020	2,469	660	2,891	41.0%
2016	6,359	2,542	650	3,167	40.0%
2015 Q4	1,534	626	166	742	40.8%
2016 Q1	1,561	616	161	784	39.5%
2016 Q2	1,597	639	163	796	40.0%
2016 Q3	1,595	649	162	783	40.7%
2016 Q4	1,606	638	164	804	39.7%
Calls[1]					
2015	2,371	1,234	222	915	52.0%
2016	2,163	1,211	184	767	56.0%
2015 Q4	581	315	52	214	54.2%
2016 Q1	556	302	49	205	54.3%
2016 Q2	537	297	46	194	55.4%
2016 Q3	541	309	45	186	57.2%
2016 Q4	530	303	45	182	57.2%

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 (exc. EE)	Virgin Media	Other	BT share (exc. EE)
2015	33,722	12,818	4,744	16,160	38.0%
2016	33,511	12,387	4,891	16,233	37.0%
2015 Q4	33,722	12,818	4,744	16,160	38.0%
2016 Q1	33,683	12,713	4,776	16,194	37.7%
2016 Q2	33,620	12,595	4,819	16,205	37.5%
2016 Q3	33,585	12,477	4,873	16,236	37.1%
2016 Q4	33,511	12,387	4,891	16,233	37.0%

Table 3

Summary of call volumes by operator (millions of minutes)

	All Operators	BT (exc. EE)[1]	Virgin Media	Other Direct Access	Other Indirect Access	BT share (exc. EE)
2015	73,892	28,389	8,737	23,355	13,411	38.4%
2016	65,091	25,194	7,446	20,151	12,300	38.7%
2015 Q4	17,700	6,797	2,099	5,538	3,267	38.4%
2016 Q1	17,401	6,705	2,066	5,376	3,254	38.5%
2016 Q2	16,384	6,327	1,910	5,077	3,069	38.6%
2016 Q3	15,743	6,119	1,742	4,873	3,009	38.9%
2016 Q4	15,564	6,043	1,728	4,825	2,967	38.8%

Table 4

Summary of call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2015	2,371	685	215	662	809
2016	2,163	627	188	530	818
2015 Q4	581	171	53	157	200
2016 Q1	556	165	51	140	200
2016 Q2	537	154	47	134	202
2016 Q3	541	154	45	131	210
2016 Q4	530	154	45	124	206

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 (exc. EE)	Virgin Media	Other Direct Access	Other Indirect Access	BT share (exc. EE)
UK geographic calls						
2015	48,404	19,131	6,651	13,696	8,926	39.5%
2016	42,097	16,978	5,749	11,637	7,733	40.3%
2015 Q4	11,673	4,637	1,624	3,264	2,148	39.7%
2016 Q1	11,372	4,562	1,599	3,115	2,097	40.1%
2016 Q2	10,574	4,259	1,479	2,899	1,936	40.3%
2016 Q3	10,032	4,082	1,341	2,786	1,823	40.7%
2016 Q4	10,119	4,075	1,330	2,837	1,878	40.3%
International calls						
2015	4,052	789	206	2,312	745	19.5%
2016	3,306	675	178	1,813	640	20.4%
2015 Q4	963	187	51	540	185	19.4%
2016 Q1	907	181	50	501	175	20.0%
2016 Q2	859	175	46	478	160	20.4%
2016 Q3	799	162	41	444	153	20.3%
2016 Q4	740	157	41	390	152	21.2%
Calls to mobiles						
2015	7,092	2,703	720	1,739	1,930	38.1%
2016	6,893	2,525	645	1,892	1,830	36.6%
2015 Q4	1,725	650	178	431	465	37.7%
2016 Q1	1,743	644	172	451	477	36.9%
2016 Q2	1,731	646	165	457	463	37.3%
2016 Q3	1,689	632	154	460	443	37.4%
2016 Q4	1,729	603	154	524	448	34.9%
Other calls[1]						
2015	14,344	5,766	1,160	5,607	1,810	40.2%
2016	12,796	5,016	874	4,809	2,097	39.2%
2015 Q4	3,340	1,323	246	1,302	469	39.6%
2016 Q1	3,379	1,318	245	1,310	506	39.0%
2016 Q2	3,220	1,247	220	1,243	511	38.7%
2016 Q3	3,223	1,243	206	1,183	591	38.6%
2016 Q4	2,975	1,208	203	1,074	490	40.6%

[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 (exc. EE)	Virgin Media	Other	BT share (exc. EE)
Access & Calls[1]					
2015	6,056	2,514	807	2,736	41.5%
2016	6,175	2,541	765	2,869	41.1%
2015 Q4	1,533	642	199	693	41.9%
2016 Q1	1,549	631	191	727	40.7%
2016 Q2	1,527	618	191	717	40.5%
2016 Q3	1,544	649	190	705	42.0%
2016 Q4	1,555	643	192	719	41.3%
Access					
2015	4,462	1,608	624	2,230	36.0%
2016	4,767	1,669	612	2,487	35.0%
2015 Q4	1,142	411	155	576	36.0%
2016 Q1	1,186	412	151	624	34.7%
2016 Q2	1,181	407	153	622	34.4%
2016 Q3	1,191	426	153	612	35.8%
2016 Q4	1,209	425	155	630	35.1%
Calls[1]					
2015	1,594	906	183	505	56.8%
2016	1,408	872	153	382	61.9%
2015 Q4	391	231	44	117	59.1%
2016 Q1	363	219	40	104	60.4%
2016 Q2	346	212	38	96	61.2%
2016 Q3	354	223	37	93	63.1%
2016 Q4	345	218	37	90	63.2%

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 (exc. EE)	Virgin Media	Other	BT share (exc. EE)
2015	26,075	9,528	4,277	12,271	36.5%
2016	26,402	9,404	4,379	12,618	35.6%
2015 Q4	26,075	9,528	4,277	12,271	36.5%
2016 Q1	26,184	9,510	4,326	12,348	36.3%
2016 Q2	26,262	9,468	4,375	12,419	36.1%
2016 Q3	26,359	9,422	4,429	12,508	35.7%
2016 Q4	26,402	9,404	4,379	12,618	35.6%

Table 8

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

	All Operators	BT (exc. EE)[1]	Virgin Media	Other	BT share (exc. EE)
2015	49,929	19,847	7,382	22,700	39.8%
2016	43,518	17,508	6,286	19,724	40.2%
2015 Q4	11,998	4,778	1,779	5,441	39.8%
2016 Q1	11,755	4,668	1,746	5,341	39.7%
2016 Q2	10,914	4,382	1,618	4,914	40.2%
2016 Q3	10,392	4,224	1,461	4,707	40.6%
2016 Q4	10,457	4,234	1,461	4,762	40.5%

Table 9

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2015	1,594	498	123	369	604
2016	1,408	430	111	271	597
2015 Q4	391	123	32	87	150
2016 Q1	363	116	30	71	145
2016 Q2	346	105	28	68	145
2016 Q3	354	105	27	67	155
2016 Q4	345	104	26	64	152

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 (exc. EE)	Virgin Media	Other	BT share (exc. EE)
UK geographic calls					
2015	35,585	14,696	5,851	15,038	41.3%
2016	30,639	12,967	5,075	12,597	42.3%
2015 Q4	8,641	3,588	1,437	3,616	41.5%
2016 Q1	8,370	3,504	1,411	3,455	41.9%
2016 Q2	7,665	3,243	1,308	3,114	42.3%
2016 Q3	7,200	3,091	1,178	2,931	42.9%
2016 Q4	7,404	3,129	1,178	3,097	42.3%
International calls					
2015	2,749	468	182	2,099	17.0%
2016	2,174	398	157	1,619	18.3%
2015 Q4	657	112	45	500	17.1%
2016 Q1	610	106	44	460	17.4%
2016 Q2	573	103	41	429	18.0%
2016 Q3	515	95	36	384	18.5%
2016 Q4	475	94	36	345	19.8%
Calls to mobiles					
2015	2,735	1,084	388	1,263	39.6%
2016	2,823	1,017	337	1,469	36.0%
2015 Q4	688	264	95	329	38.4%
2016 Q1	686	250	91	345	36.4%
2016 Q2	701	262	88	351	37.4%
2016 Q3	683	257	79	347	37.6%
2016 Q4	753	248	79	426	33.0%
Other calls[1]					
2015	8,860	3,599	961	4,300	40.6%
2016	7,882	3,126	717	4,039	39.7%
2015 Q4	2,013	814	202	997	40.4%
2016 Q1	2,089	808	200	1,081	38.7%
2016 Q2	1,974	774	181	1,019	39.2%
2016 Q3	1,994	781	168	1,045	39.2%
2016 Q4	1,824	763	168	893	41.8%

[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 (exc. EE)	Virgin Media	Other	BT share (exc. EE)
Access & Calls[1]					
2015	2,314	1,168	75	1,070	50.5%
2016	2,337	1,198	69	1,069	51.3%
2015 Q4	577	295	19	263	51.1%
2016 Q1	564	283	18	263	50.2%
2016 Q2	605	314	17	273	52.0%
2016 Q3	588	306	17	265	52.0%
2016 Q4	579	294	17	268	50.8%
Access					
2015	1,557	861	36	660	55.3%
2016	1,592	873	38	680	54.8%
2015 Q4	391	215	11	166	55.0%
2016 Q1	374	204	10	160	54.5%
2016 Q2	416	232	10	174	55.8%
2016 Q3	404	224	9	171	55.3%
2016 Q4	397	213	9	175	53.6%
Calls[1]					
2015	756	307	39	410	40.6%
2016	745	325	31	389	43.6%
2015 Q4	186	80	9	97	42.8%
2016 Q1	190	79	8	103	41.7%
2016 Q2	189	82	8	99	43.4%
2016 Q3	184	82	8	94	44.7%
2016 Q4	182	82	7	93	44.7%

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 (exc. EE)	Virgin Media	Other	BT share (exc. EE)
2015	7,647	3,291	467	3,889	43.0%
2016	7,109	2,983	511	3,614	42.0%
2015 Q4	7,647	3,291	467	3,889	43.0%
2016 Q1	7,499	3,203	450	3,846	42.7%
2016 Q2	7,357	3,127	444	3,786	42.5%
2016 Q3	7,226	3,054	444	3,728	42.3%
2016 Q4	7,109	2,983	511	3,614	42.0%

Table 13
Summary of business call volumes by operator (millions of minutes)

	All Operators	BT (exc. EE)[1]	Virgin Media	Other Direct Access	Other Indirect Access	BT share (exc. EE)
2015	23,921	8,504	1,355	7,657	6,405	35.6%
2016	21,544	7,663	1,160	6,662	6,059	35.6%
2015 Q4	5,695	2,012	320	1,828	1,535	35.3%
2016 Q1	5,638	2,031	320	1,718	1,569	36.0%
2016 Q2	5,462	1,939	292	1,705	1,526	35.5%
2016 Q3	5,343	1,889	281	1,646	1,527	35.4%
2016 Q4	5,101	1,804	267	1,593	1,437	35.4%

Table 14
Summary of business call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2015	756	188	91	293	185
2016	745	198	77	259	211
2015 Q4	186	48	21	71	46
2016 Q1	190	48	21	69	53
2016 Q2	189	49	19	66	54
2016 Q3	184	50	19	64	52
2016 Q4	182	51	18	61	52

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 (exc. EE)	Virgin Media	Other Direct Access	Other Indirect Access	BT share (exc. EE)
UK geographic calls						
2015	12,818	4,434	800	4,137	3,447	34.6%
2016	11,458	4,011	674	3,537	3,236	35.0%
2015 Q4	3,032	1,049	187	964	831	34.6%
2016 Q1	3,002	1,058	188	913	843	35.2%
2016 Q2	2,908	1,016	171	900	821	34.9%
2016 Q3	2,832	991	163	879	799	35.0%
2016 Q4	2,715	946	152	845	773	34.8%
International calls						
2015	1,294	321	24	715	234	24.8%
2016	1,131	277	21	622	211	24.5%
2015 Q4	306	75	6	165	60	24.5%
2016 Q1	296	75	6	159	56	25.3%
2016 Q2	286	72	5	158	51	25.2%
2016 Q3	285	67	5	158	55	23.5%
2016 Q4	265	63	5	147	50	23.8%
Calls to mobiles						
2015	4,356	1,618	332	992	1,413	37.1%
2016	4,069	1,508	308	939	1,314	37.1%
2015 Q4	1,037	386	83	235	332	37.2%
2016 Q1	1,057	394	81	237	346	37.3%
2016 Q2	1,030	384	77	235	334	37.3%
2016 Q3	1,006	375	75	233	323	37.3%
2016 Q4	977	355	75	234	312	36.3%
Other calls*						
2015	5,453	2,131	199	1,812	1,310	39.1%
2016	4,886	1,867	157	1,564	1,298	38.2%
2015 Q4	1,320	502	44	463	311	38.0%
2016 Q1	1,283	504	45	409	325	39.3%
2016 Q2	1,238	467	39	412	320	37.7%
2016 Q3	1,221	456	38	376	351	37.4%
2016 Q4	1,144	440	35	367	302	38.5%

[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 (ex. EE)
2015	24,708	14,458	4,701	5,550	32.4%
2016	25,250	13,555	4,924	6,771	32.8%
2015 Q4	24,708	14,458	4,701	5,550	32.4%
2016 Q1	24,750	14,257	4,771	5,722	32.7%
2016 Q2	24,868	14,030	4,814	6,023	32.8%
2016 Q3	25,034	13,812	4,876	6,346	32.7%
2016 Q4	25,250	13,555	4,924	6,771	32.8%

3. Mobile telecoms market data tables

Q4 2016 (October to December 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
2015	15,170	10,297	392	313	428	522	699	764	1,755
2016	15,335	10,874	310	278	360	453	584	708	1,768
2015 Q4	3,833	2,633	91	76	105	127	171	188	442
2016 Q1	3,785	2,667	82	69	92	117	154	175	429
2016 Q2	3,807	2,705	79	70	93	113	143	176	428
2016 Q3	3,879	2,733	77	70	90	110	156	181	462
2016 Q4	3,864	2,768	73	70	85	113	132	175	449

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
2015	142.62	33.13	39.47	55.99	6.49	1.90	5.65	101.68
2016	150.55	33.73	42.61	60.11	5.93	2.28	5.89	96.51
2015 Q4	36.82	8.50	10.36	14.46	1.60	0.50	1.41	25.22
2016 Q1	36.84	8.31	10.28	14.90	1.52	0.47	1.37	24.67
2016 Q2	38.07	8.21	10.60	15.69	1.57	0.51	1.49	24.03
2016 Q3	37.62	8.64	10.76	14.58	1.49	0.73	1.41	24.08
2016 Q4	38.02	8.56	10.97	14.94	1.35	0.57	1.62	23.74

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
2015	31.18	84.73	51.38	33.35	1.07	60.6%	5.59
2016	29.73	83.51	54.02	29.48	-1.22	64.7%	4.98
2015 Q4	7.85	84.73	51.38	33.35	-0.27	60.6%	5.59
2016 Q1	6.97	83.88	52.03	31.85	-0.85	62.0%	5.05
2016 Q2	7.08	83.57	52.35	31.22	-0.30	62.6%	4.96
2016 Q3	8.04	83.74	53.21	30.53	0.17	63.5%	4.96
2016 Q4	7.63	83.51	54.02	29.48	-0.24	64.7%	4.98

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
2015	15.00	21.84	4.75
2016	15.25	21.24	4.87
2015 Q4	15.06	21.57	4.93
2016 Q1	14.97	21.18	4.83
2016 Q2	15.16	21.17	4.92
2016 Q3	15.46	21.41	4.96
2016 Q4	15.40	21.18	4.76

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
2015	52.48
2016	54.30
2015 Q4	13.03
2016 Q1	13.49
2016 Q2	13.77
2016 Q3	13.37
2016 Q4	13.67

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