

Telecommunications market data tables

Q1 2017

1 – Market monitor

2 – Fixed telecoms market data tables

3 – Mobile telecoms market data tables

Published: **31 August 2017**

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

- Fixed voice services generated £2.1bn in revenue during Q1 2017, in line with Q1 2016. BT's share of these revenues (excluding EE) was 43.6%, a 0.3 percentage point (pp) increase compared to Q1 2016 but a 0.5pp decline compared to Q4 2016.
- There was a total of 33.3 million UK PSTN lines and ISDN channels in Q1 2017. This represented a year-on-year decrease of 1.2% (410k) and a 0.6% (213k) fall compared to the previous quarter.
- UK landlines generated 14.8 billion minutes of outgoing calls in Q1 2017, a fall of 2.6 billion minutes (14.7%) compared to Q1 2016.

Fixed broadband

- There were 25.3 million UK fixed broadband connections at the end of Q1 2017, a year-on-year increase of 2.3% (571k), and a 0.4% (100k) increase compared to the previous quarter.
- BT's share of these lines (excluding EE) was 32.6%, a decrease of 0.1 pp compared to Q1 2016 (32.7%).
- There were 7.1 million 'other (inc. FTTx)' fixed broadband lines, predominantly comprised of superfast fibre broadband connections, at the end of Q1 2017, a year-on-year increase of 1.4 million (25.5%). These connections represented 28.1% of all UK fixed broadband connections, up from 22.9% in Q1 2016.

Mobile services

- Mobile telephony services generated £3.8bn in retail revenues in Q1 2017, a £65m (1.7%) decrease from the previous quarter but a £32m (0.8%) increase compared to a year previously.
- Total outgoing mobile call volumes were 38.5 billion minutes in Q1 2017, a decrease of 0.3 billion minutes (0.8%) since the previous quarter but up 1.6 billion minutes (4.4%) compared to Q1 2016.
- The total number of outgoing SMS and MMS messages was 20.6 billion in Q1 2017, down 1.6 billion (7.4%) on the previous quarter and a decrease of 3.0 billion messages (12.6%) compared to a year previously.
- The number of active mobile subscriptions (excluding M2M connections) was 83.8 million at the end of Q1 2017, up 0.4 million (0.5%) from Q1 2016. Over the same period, the number of dedicated mobile broadband subscriptions (again, excluding M2M) remained stable at 5.0 million.

2. Fixed telecoms market data tables

Q1 2016 (January to March 2017)

Table

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

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 & Calls¹					
2015	8,390	3,703	882	3,805	44.1%
2016	8,521	3,753	831	3,938	44.0%
2016 Q1	2,117	918	210	990	43.3%
2016 Q2	2,136	936	209	991	43.8%
2016 Q3	2,136	959	207	970	44.9%
2016 Q4	2,132	940	205	987	44.1%
2017 Q1	2,118	924	203	991	43.6%
Access					
2015	6,018	2,469	660	2,889	41.0%
2016	6,358	2,542	650	3,166	40.0%
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%
2017 Q1	1,612	632	166	815	39.2%
Calls¹					
2015	2,372	1,234	222	915	52.0%
2016	2,163	1,211	180	771	56.0%
2016 Q1	557	302	49	206	54.2%
2016 Q2	539	297	46	195	55.2%
2016 Q3	541	309	45	187	57.1%
2016 Q4	526	303	40	183	57.5%
2017 Q1	506	292	37	176	57.8%

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	33,486	12,387	4,891	16,208	37.0%
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	33,486	12,387	4,891	16,208	37.0%
2017 Q1	33,273	12,238	4,811	16,225	36.8%

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	73,884	28,389	8,737	23,355	13,403	38.4%
2016	64,844	25,194	7,222	20,151	12,277	38.9%
2016 Q1	17,396	6,705	2,066	5,376	3,249	38.5%
2016 Q2	16,377	6,327	1,910	5,077	3,063	38.6%
2016 Q3	15,737	6,119	1,742	4,873	3,003	38.9%
2016 Q4	15,334	6,043	1,504	4,825	2,962	39.4%
2017 Q1	14,832	5,954	1,310	4,910	2,658	40.1%

Table 4**Summary of call revenues by call type (£millions)**

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls¹
2015	2,372	685	215	662	810
2016	2,163	625	187	529	821
2016 Q1	557	165	51	140	201
2016 Q2	539	154	47	134	203
2016 Q3	541	154	45	131	210
2016 Q4	526	153	44	123	206
2017 Q1	506	151	44	118	192

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	48,405	19,131	6,651	13,696	8,927	39.5%
2016	41,927	16,978	5,574	11,637	7,738	40.5%
2016 Q1	11,373	4,562	1,599	3,115	2,098	40.1%
2016 Q2	10,575	4,259	1,479	2,899	1,937	40.3%
2016 Q3	10,033	4,082	1,341	2,786	1,824	40.7%
2016 Q4	9,946	4,075	1,155	2,837	1,879	41.0%
2017 Q1	9,544	4,017	994	3,027	1,506	42.1%
International calls						
2015	4,052	789	206	2,312	745	19.5%
2016	3,301	675	173	1,813	640	20.4%
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	735	157	36	390	152	21.4%
2017 Q1	676	153	31	379	112	22.6%
Calls to mobiles						
2015	7,092	2,703	720	1,739	1,930	38.1%
2016	6,881	2,525	633	1,892	1,830	36.7%
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	1,717	603	142	524	448	35.1%
2017 Q1	1,674	601	134	532	407	35.9%
Other calls¹						
2015	14,335	5,766	1,160	5,607	1,801	40.2%
2016	12,735	5,016	842	4,809	2,068	39.4%
2016 Q1	3,372	1,318	245	1,310	499	39.1%
2016 Q2	3,213	1,247	220	1,243	503	38.8%
2016 Q3	3,215	1,243	206	1,183	583	38.7%
2016 Q4	2,935	1,208	171	1,074	483	41.2%
2017 Q1	2,938	1,183	151	971	633	40.3%

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 & Calls¹					
2015	6,056	2,514	807	2,736	41.5%
2016	6,170	2,541	761	2,868	41.2%
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	1,550	643	188	719	41.5%
2017 Q1	1,537	625	185	727	40.7%
Access					
2015	4,462	1,608	624	2,230	36.0%
2016	4,767	1,669	612	2,486	35.0%
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	629	35.1%
2017 Q1	1,222	421	157	645	34.4%
Calls¹					
2015	1,594	906	183	505	56.8%
2016	1,404	872	149	382	62.1%
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	341	218	33	90	64.0%
2017 Q1	315	204	29	82	64.8%

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	26,377	9,404	4,379	12,594	35.7%
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	26,377	9,404	4,379	12,594	35.7%
2017 Q1	26,389	9,327	4,390	12,671	35.3%

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	49,925	19,847	7,382	22,696	39.8%
2016	43,277	17,508	6,063	19,706	40.5%
2016 Q1	11,751	4,668	1,746	5,337	39.7%
2016 Q2	10,909	4,382	1,618	4,909	40.2%
2016 Q3	10,388	4,224	1,461	4,703	40.7%
2016 Q4	10,229	4,234	1,238	4,757	41.4%
2017 Q1	9,660	4,118	1,030	4,512	42.6%

Table 9**Summary of residential call revenues by call type (£millions)**

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls¹
2015	1,594	498	123	369	604
2016	1,404	428	111	270	596
2016 Q1	363	116	30	71	145
2016 Q2	346	105	28	68	145
2016 Q3	354	105	27	67	155
2016 Q4	341	102	26	62	151
2017 Q1	315	98	24	58	135

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	35,586	14,696	5,851	15,039	41.3%
2016	30,471	12,967	4,900	12,604	42.6%
2016 Q1	8,371	3,504	1,411	3,456	41.9%
2016 Q2	7,666	3,243	1,308	3,115	42.3%
2016 Q3	7,201	3,091	1,178	2,932	42.9%
2016 Q4	7,232	3,129	1,003	3,100	43.3%
2017 Q1	6,810	3,046	834	2,930	44.7%
International calls					
2015	2,749	468	182	2,099	17.0%
2016	2,169	398	152	1,619	18.4%
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	470	94	31	345	20.0%
2017 Q1	419	89	26	304	21.3%
Calls to mobiles					
2015	2,735	1,084	388	1,263	39.6%
2016	2,811	1,017	325	1,469	36.2%
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	741	248	67	426	33.5%
2017 Q1	698	240	54	404	34.4%
Other calls¹					
2015	8,855	3,599	961	4,295	40.6%
2016	7,826	3,126	686	4,014	39.9%
2016 Q1	2,084	808	200	1,076	38.8%
2016 Q2	1,969	774	181	1,014	39.3%
2016 Q3	1,988	781	168	1,039	39.3%
2016 Q4	1,786	763	137	886	42.7%
2017 Q1	1,733	743	116	874	42.9%

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 & Calls¹					
2015	2,312	1,168	75	1,069	50.5%
2016	2,337	1,198	69	1,069	51.3%
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%
2017 Q1	578	297	17	264	51.3%
Access					
2015	1,556	861	36	659	55.4%
2016	1,592	873	38	680	54.8%
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%
2017 Q1	390	211	9	170	54.1%
Calls¹					
2015	756	307	39	410	40.6%
2016	745	325	31	389	43.6%
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%
2017 Q1	188	86	8	94	45.6%

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 (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%
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%
2017 Q1	6,885	2,910	421	3,553	42.3%

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%
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%
2017 Q1	5,168	1,832	280	1,513	1,543	35.5%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls¹
2015	756	188	91	293	185
2016	745	198	77	259	211
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
2017 Q1	188	54	20	60	54

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	11,456	4,011	674	3,537	3,234	35.0%
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	2,713	946	152	845	771	34.9%
2017 Q1	2,734	971	160	822	781	35.5%
International calls						
2015	1,294	321	24	715	234	24.8%
2016	1,131	277	21	622	211	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%
2017 Q1	257	64	5	142	46	24.9%
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%
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%
2017 Q1	976	361	80	215	320	37.0%
Other calls*						
2015	5,453	2,131	199	1,812	1,310	39.1%
2016	4,888	1,867	157	1,564	1,300	38.2%
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	1,146	440	35	367	304	38.4%
2017 Q1	1,201	436	35	334	396	36.3%

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 (ex. EE)
2015	24,686	14,488	4,701	5,498	32.4%
2016	25,190	13,569	4,924	6,697	32.8%
2016 Q1	24,718	14,295	4,771	5,653	32.7%
2016 Q2	24,827	14,080	4,814	5,932	32.8%
2016 Q3	24,983	13,823	4,876	6,284	32.8%
2016 Q4	25,190	13,569	4,924	6,697	32.8%
2017 Q1	25,289	13,192	5,003	7,094	32.6%

3. Mobile telecoms market data tables

Q1 2017 (January to March 2017)

Table

1	Estimated retail revenues generated by mobile telephony	15
2	Call and message volumes by call type	15
3	Subscriber numbers by type	16
4	Average monthly retail revenue per subscriber	16
5	Interconnection call volumes	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**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	15,221	10,337	395	315	434	523	685	773	1,758
2016	15,368	10,884	314	281	364	453	587	714	1,773
2016 Q1	3,787	2,667	82	69	93	117	154	177	429
2016 Q2	3,805	2,703	79	70	92	112	144	176	430
2016 Q3	3,892	2,738	78	71	92	110	156	183	463
2016 Q4	3,884	2,776	75	71	87	114	132	178	451
2017 Q1	3,819	2,814	68	63	74	104	119	163	414

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	142.99	33.22	39.59	56.18	6.49	1.91	5.61	101.01
2016	151.17	33.78	42.98	60.65	5.94	2.28	5.54	90.95
2016 Q1	36.84	8.31	10.28	14.90	1.53	0.47	1.36	23.52
2016 Q2	37.90	8.21	10.60	15.67	1.56	0.51	1.36	22.61
2016 Q3	37.67	8.66	10.78	14.61	1.50	0.73	1.39	22.62
2016 Q4	38.76	8.61	11.33	15.47	1.36	0.57	1.43	22.20
2017 Q1	38.46	8.64	11.48	15.09	1.25	0.52	1.48	20.56

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	30.51	85.15	51.84	33.31	1.49	60.9%	5.52
2016	29.28	83.91	54.44	29.47	-1.24	64.9%	4.98
2016 Q1	6.84	83.40	52.40	31.00	-1.75	62.8%	5.00
2016 Q2	6.92	83.69	52.79	30.90	0.29	63.1%	4.96
2016 Q3	7.89	84.16	53.70	30.46	0.47	63.8%	4.96
2016 Q4	7.63	83.91	54.44	29.47	-0.25	64.9%	4.98
2017 Q1	6.58	83.81	54.83	28.98	-0.10	65.4%	5.00

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	14.98	21.84	4.79
2016	15.26	21.25	4.84
2016 Q1	14.98	21.22	4.87
2016 Q2	15.18	21.21	4.93
2016 Q3	15.46	21.41	5.14
2016 Q4	15.41	21.18	4.99
2017 Q1	15.18	20.79	4.69

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
2016 Q1	13.49
2016 Q2	13.77
2016 Q3	13.37
2016 Q4	13.67
2017 Q1	13.86

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