Telecommunications market data tables Q4 2015

1 – Market monitor

2 – Fixed telecoms market data tables

3 – Mobile telecoms market data tables

Published: **28 April 2016**

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 were £2.1bn in Q4 2015, up £28m (1.4%) from the previous quarter and an increase of £23m (1.1%) compared to Q4 2014. BT’s share of these revenues was 44.3%, 0.3 percentage points lower than it had been a year previously.
- Access revenues accounted for 72.2% of the total retail fixed voice revenue in Q4 2015, a 2.6 percentage point increase compared to Q4 2014.
- The total number of fixed exchange lines (including PSTN lines and ISDN channels) was 33.2 million at the end of Q4 2015, down 325k (1.0%) compared to a year previously.
- UK fixed lines generated 18.0 billion minutes of outgoing calls in Q4 2015, a 16.1 million (0.1%) fall compared to the previous quarter and down 1.8 billion minutes (9.3%) compared to Q4 2014.

Fixed broadband

- There were 24.7 million fixed broadband connections at the end of Q4 2015, an increase of 923k (3.9%) compared to a year previously. BT’s retail share of these connections was 32.4% at the end of Q4 2015, an increase of 0.4 percentage points compared to Q4 2014.
- Of these connections, 5.5 million (22.1%) were classified as being ‘other inc. FTTx’ (almost all of which are fibre broadband connections), a 6.8 percentage points increase compared to a year previously.

Mobile services

- Mobile telephony services generated £3.8bn in retail revenues in Q4 2015, a £1m (0.03%) increase from the previous quarter and a £25m (0.6%) decrease compared to a year previously.
- Total outgoing mobile call volumes were just under 37.0 billion minutes in Q4 2015, an increase of 2.0 billion minutes (5.7%) since the previous quarter and up 1.5 billion minutes (4.3%) since Q4 2014.
- The total number of outgoing SMS and MMS messages was 25.1 billion in Q4 2015, up 0.4 billion messages (1.6%) compared to the previous quarter but down 1.3 billion messages (4.8%) compared to a year previously.
- The number of active mobile subscriptions was 85.3 million, up 1.6 million (2.0%) compared to a year previously. The number of dedicated mobile broadband subscriptions (excluding M2M) increased by 0.4 million (7.5%) to 5.6 million in a year to Q4 2015.

2. Fixed telecoms market data tables

Q4 2015 (October to December 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]					
2014	8,436	3,798	898	3,740	45.0%
2015	8,399	3,703	882	3,814	44.1%
2014 Q4	2,099	937	220	943	44.6%
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	2,123	941	218	964	44.3%
Access					
2014	5,801	2,519	632	2,650	43.4%
2015	6,019	2,469	660	2,891	41.0%
2014 Q4	1,463	620	156	687	42.3%
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%
Calls[1]					
2014	2,635	1,279	266	1,090	48.6%
2015	2,379	1,234	222	923	51.9%
2014 Q4	636	317	63	256	49.8%
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	589	315	52	222	53.5%

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
2014	33,537	13,243	4,737	15,557	39.5%
2015	33,211	12,818	4,744	15,649	38.6%
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	33,617	12,990	4,709	15,919	38.6%
2015 Q3	33,596	12,894	4,707	15,995	38.4%
2015 Q4	33,211	12,818	4,744	15,649	38.6%

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	81,814	31,259	10,155	24,630	15,770	38.2%
2015	74,247	28,389	8,737	23,517	13,604	38.2%
2014 Q4	19,851	7,678	2,433	6,084	3,656	38.7%
2015 Q1	19,878	7,605	2,368	6,288	3,617	38.3%
2015 Q2	18,328	7,026	2,155	5,881	3,266	38.3%
2015 Q3	18,029	6,961	2,115	5,648	3,305	38.6%
2015 Q4	18,013	6,797	2,099	5,700	3,417	37.7%

Table 4

Summary of call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2014	2,635	783	234	763	854
2015	2,379	687	214	661	817
2014 Q4	636	191	56	181	208
2015 Q1	613	183	55	172	203
2015 Q2	583	166	53	164	199
2015 Q3	595	165	53	166	211
2015 Q4	589	173	53	159	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						
2014	55,019	21,165	7,539	16,131	10,184	38.5%
2015	49,533	19,131	6,651	15,023	8,728	38.6%
2014 Q4	13,437	5,237	1,832	3,998	2,371	39.0%
2015 Q1	13,366	5,155	1,788	4,108	2,315	38.6%
2015 Q2	12,225	4,708	1,632	3,796	2,089	38.5%
2015 Q3	11,896	4,631	1,607	3,543	2,115	38.9%
2015 Q4	12,046	4,637	1,624	3,576	2,209	38.5%
International calls						
2014	4,394	883	227	2,442	842	20.1%
2015	4,037	789	206	2,321	722	19.5%
2014 Q4	1,073	219	55	604	195	20.4%
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	957	187	51	549	170	19.5%
Calls to mobiles						
2014	7,581	2,899	778	1,741	2,164	38.2%
2015	7,156	2,703	720	1,762	1,971	37.8%
2014 Q4	1,843	713	191	437	502	38.7%
2015 Q1	1,833	703	185	444	501	38.3%
2015 Q2	1,767	675	177	431	484	38.2%
2015 Q3	1,768	675	180	433	480	38.2%
2015 Q4	1,788	650	178	454	505	36.4%
Other calls[1]						
2014	14,820	6,312	1,611	4,317	2,580	42.6%
2015	13,521	5,766	1,160	4,411	2,184	42.6%
2014 Q4	3,498	1,509	355	1,046	588	43.1%
2015 Q1	3,584	1,535	341	1,100	609	42.8%
2015 Q2	3,322	1,443	296	1,065	518	43.4%
2015 Q3	3,392	1,465	277	1,126	524	43.2%
2015 Q4	3,222	1,323	246	1,120	533	41.1%

[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%
2014 Q4	1,482	624	201	657	42.1%
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	692	41.9%
Access					
2014	4,148	1,602	599	1,947	38.6%
2015	4,462	1,608	624	2,230	36.0%
2014 Q4	1,055	392	148	515	37.2%
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%
Calls[1]					
2014	1,759	932	222	605	53.0%
2015	1,594	906	183	505	56.8%
2014 Q4	427	232	53	142	54.4%
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%

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	25,565	9,528	4,277	11,760	37.3%
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	25,791	9,577	4,227	11,988	37.1%
2015 Q3	25,881	9,522	4,234	12,125	36.8%
2015 Q4	25,565	9,528	4,277	11,760	37.3%

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%
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%
2015 Q3	12,078	4,815	1,778	5,485	39.9%
2015 Q4	11,992	4,778	1,779	5,435	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]
2014	1,759	577	132	430	620
2015	1,594	507	123	370	594
2014 Q4	427	142	32	104	150
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	87	147

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	36,489	14,696	5,851	15,942	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%
2015 Q3	8,728	3,526	1,412	3,790	40.4%
2015 Q4	8,791	3,588	1,437	3,766	40.8%
International calls					
2014	3,015	548	203	2,264	18.2%
2015	2,750	468	182	2,100	17.0%
2014 Q4	738	138	50	550	18.7%
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	656	112	45	499	17.1%
Calls to mobiles					
2014	2,940	1,187	434	1,319	40.4%
2015	2,738	1,084	388	1,266	39.6%
2014 Q4	721	296	108	317	41.0%
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	38.5%
Other calls[1]					
2014	9,028	3,965	1,318	3,745	43.9%
2015	8,009	3,599	961	3,449	44.9%
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%
2015 Q3	2,023	908	227	888	44.9%
2015 Q4	1,858	814	202	842	43.8%

[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	Virgin Media	Other	BT share
Access & Calls[1]					
2014	2,504	1,239	77	1,188	49.5%
2015	2,323	1,168	75	1,079	50.3%
2014 Q4	610	305	19	286	50.0%
2015 Q1	582	290	20	272	49.9%
2015 Q2	572	286	18	268	50.0%
2015 Q3	583	297	18	268	51.0%
2015 Q4	586	295	19	272	50.3%
Access					
2014	1,654	917	33	703	55.5%
2015	1,557	861	36	660	55.3%
2014 Q4	408	227	8	172	55.8%
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%
Calls[1]					
2014	850	322	43	485	37.8%
2015	765	307	39	419	40.1%
2014 Q4	202	78	10	114	38.5%
2015 Q1	194	75	12	108	38.5%
2015 Q2	184	72	10	103	39.0%
2015 Q3	192	81	9	102	41.9%
2015 Q4	195	80	9	106	40.9%

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%
2014 Q4	7,988	3,549	491	3,948	44.4%
2015 Q1	7,870	3,482	484	3,904	44.2%
2015 Q2	7,826	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%

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	26,015	9,226	1,763	7,829	7,196	35.5%
2015	24,257	8,504	1,355	7,819	6,580	35.1%
2014 Q4	6,228	2,221	388	1,938	1,681	35.7%
2015 Q1	6,280	2,240	370	1,987	1,683	35.7%
2015 Q2	5,996	2,115	328	1,948	1,605	35.3%
2015 Q3	5,959	2,137	337	1,894	1,591	35.9%
2015 Q4	6,023	2,012	320	1,990	1,701	33.4%

Table 14

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2014	850	207	102	333	208
2015	774	181	99	293	201
2014 Q4	202	50	24	77	51
2015 Q1	194	46	24	77	48
2015 Q2	184	44	22	71	47
2015 Q3	192	44	23	73	53
2015 Q4	195	47	22	73	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	14,254	4,882	1,102	4,350	3,919	34.3%
2015	13,053	4,434	800	4,243	3,576	34.0%
2014 Q4	3,410	1,178	237	1,059	936	34.5%
2015 Q1	3,373	1,180	224	1,081	888	35.0%
2015 Q2	3,254	1,100	194	1,074	886	33.8%
2015 Q3	3,173	1,105	195	1,018	855	34.8%
2015 Q4	3,254	1,049	187	1,070	948	32.2%
International calls						
2014	1,378	335	24	794	226	24.3%
2015	1,291	321	24	724	223	24.9%
2014 Q4	335	81	5	199	51	24.2%
2015 Q1	338	86	6	194	52	25.5%
2015 Q2	321	81	5	177	58	25.3%
2015 Q3	329	79	7	179	64	24.0%
2015 Q4	304	75	6	174	49	24.7%
Calls to mobiles						
2014	4,642	1,713	344	1,017	1,568	36.9%
2015	4,418	1,618	332	1,015	1,453	36.6%
2014 Q4	1,122	417	83	258	364	37.2%
2015 Q1	1,136	424	84	259	370	37.3%
2015 Q2	1,094	404	80	250	360	36.9%
2015 Q3	1,086	404	85	248	349	37.2%
2015 Q4	1,102	386	83	258	375	35.0%
Other calls*						
2014	5,741	2,296	293	1,669	1,483	40.0%
2015	5,495	2,131	199	1,837	1,328	38.8%
2014 Q4	1,361	545	63	423	330	40.0%
2015 Q1	1,433	550	56	454	373	38.4%
2015 Q2	1,328	530	49	447	302	39.9%
2015 Q3	1,371	549	50	449	323	40.0%
2015 Q4	1,363	502	44	487	330	36.8%

[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	24,652	14,493	4,701	5,458	32.4%
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	15,005	4,578	4,591	32.3%
2015 Q3	24,382	14,759	4,632	4,991	32.3%
2015 Q4	24,652	14,493	4,701	5,458	32.4%

3. Mobile telecoms market data tables

Q4 2015 (October to December 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
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
2014 Q4	3,861	2,173	115	93	126	151	212	314	676
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

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	142.76	33.16	39.53	55.94	6.65	1.83	5.65	101.40
2014 Q4	35.45	8.33	9.87	13.62	1.75	0.41	1.46	26.40
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	36.97	8.53	10.44	14.41	1.76	0.43	1.40	25.14

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	85.30	51.82	33.48	1.64	60.7%	5.59
2014 Q4	8.48	83.66	49.34	34.32	0.63	59.0%	5.20
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	85.51	51.15	34.36	1.02	59.8%	5.56
2015 Q4	7.85	85.30	51.82	33.48	-0.21	60.7%	5.59

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	14.97	22.11	4.75
2014 Q4	15.44	23.03	5.09
2015 Q1	14.90	22.17	4.63
2015 Q2	14.97	22.19	4.64
2015 Q3	15.04	22.25	4.82
2015 Q4	14.97	21.85	4.91

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	50.61
2014 Q4	13.49
2015 Q1	13.09
2015 Q2	12.64
2015 Q3	11.03
2015 Q4	13.85

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