Telecommunications market data tables Q4 2014

1 – Market monitor

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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

- Retail fixed voice services generated £2.03bn in revenue in Q4 2014, a £6m (0.3%) increase compared to the previous quarter and a £56m (2.7%) fall compared to Q4 2013. BT’s share of these revenues was 46.2%, a decline of 0.8 percentage points compared to Q4 2013.

- Access revenues accounted for 69.0% of total retail fixed voice revenue in Q4 2014, a 2.6 percentage point increase compared to a year previously.

- Fixed lines generated 19.3 billion minutes of outgoing calls in Q4 2014, a fall of 2.6 billion minutes (11.8%) compared to Q4 2013.

- There were 33.2 million PSTN lines and ISDN channels at the end of 2014, down 77,000 (0.2%) compared to the end of 2013.

Fixed broadband

- There were 23.7 million fixed broadband connections at the end of 2014, an increase of 923,000 (4.0%) compared to a year previously. BT’s share of these connections was 32.0% at the end of Q4 2014, a 0.8 percentage point increase compared to Q4 2013.

- The proportion of these connections that were classified as being ‘other inc. FTTx’ (which are almost all fibre broadband connections), increased from 10.3% to 15.4% in the year to December 2014.

Mobile services

- Mobile telephony services generated £3.85 billion in retail revenues in Q4 2014, a £9 million (0.2%) increase compared to Q4 2013 and an £11 million (0.3%) increase compared to the previous quarter. Mobile data services generated £676million revenue in Q4 2014, £49 million (7.8%) more than in Q4 2013.

- There were 35.4 billion outgoing mobile call minutes in Q4 2014, 298 million minutes (0.8%) more than in Q4 2013. The total number of outgoing SMS and MMS messages was 26.4 billion in Q4 2014, a decrease of 4.4 billion messages (14.4%) compared to Q4 2013 and a fall of 629 million messages (2.3%) compared to the previous quarter.

- Excluding M2M connections, there were 83.7 million mobile subscriptions the end of Q4 2014, 994,000 more (1.2%) than a year previously. The number of dedicated mobile broadband subscriptions (excluding M2M) was 5.2 million in Q4 2014, an increase of 292,000 (5.9%) compared to Q4 2013.

2. Fixed telecoms market data tables

Q4 2014 (October to December 2014)

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]					
2013	8,438	3,903	1,021	3,515	46.2%
2014	8,166	3,798	898	3,469	46.5%
2013 Q4	2,085	979	239	867	47.0%
2014 Q1	2,085	996	232	858	47.7%
2014 Q2	2,027	933	225	869	46.0%
2014 Q3	2,024	934	221	869	46.1%
2014 Q4	2,030	937	220	873	46.2%
Access					
2013	5,540	2,572	703	2,265	46.4%
2014	5,576	2,519	632	2,425	45.2%
2013 Q4	1,386	647	164	574	46.7%
2014 Q1	1,412	669	162	581	47.4%
2014 Q2	1,382	617	159	605	44.7%
2014 Q3	1,381	613	155	613	44.4%
2014 Q4	1,401	620	156	625	44.2%
Calls[1]					
2013	2,899	1,331	318	1,250	45.9%
2014	2,589	1,279	266	1,044	49.4%
2013 Q4	699	332	75	293	47.4%
2014 Q1	673	327	70	276	48.5%
2014 Q2	645	315	66	264	48.9%
2014 Q3	643	320	67	256	49.8%
2014 Q4	628	317	63	248	50.5%

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
2013	33,316	13,745	4,751	14,819	41.3%
2014	33,238	13,002	4,737	15,500	39.1%
2013 Q4	33,316	13,745	4,751	14,819	41.3%
2014 Q1	33,169	13,523	4,742	14,904	40.8%
2014 Q2	33,140	13,333	4,732	15,076	40.2%
2014 Q3	33,117	13,145	4,723	15,248	39.7%
2014 Q4	33,238	13,002	4,737	15,500	39.1%

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
2013	92,014	35,646	11,199	25,717	19,452	38.7%
2014	80,312	30,596	10,155	24,616	14,945	38.1%
2013 Q4	21,885	8,278	2,779	6,445	4,382	37.8%
2014 Q1	21,067	7,914	2,674	6,320	4,158	37.6%
2014 Q2	20,237	7,770	2,541	6,136	3,790	38.4%
2014 Q3	19,710	7,526	2,507	6,091	3,587	38.2%
2014 Q4	19,299	7,386	2,433	6,069	3,410	38.3%

Table 4

Summary of call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2013	2,899	906	271	897	824
2014	2,589	783	235	763	808
2013 Q4	699	216	65	215	204
2014 Q1	673	206	61	203	203
2014 Q2	645	194	59	189	204
2014 Q3	643	192	58	191	202
2014 Q4	628	191	56	181	200

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						
2013	60,857	23,711	8,145	16,920	12,081	39.0%
2014	53,619	20,665	7,539	16,116	9,299	38.5%
2013 Q4	14,577	5,599	2,051	4,217	2,710	38.4%
2014 Q1	14,093	5,346	1,975	4,150	2,621	37.9%
2014 Q2	13,484	5,267	1,875	4,013	2,329	39.1%
2014 Q3	13,086	5,045	1,857	3,971	2,214	38.6%
2014 Q4	12,956	5,007	1,832	3,983	2,135	38.6%
International calls						
2013	4,926	979	257	2,598	1,092	19.9%
2014	4,334	874	227	2,441	792	20.2%
2013 Q4	1,176	232	63	645	237	19.7%
2014 Q1	1,132	221	60	632	219	19.5%
2014 Q2	1,089	225	57	602	205	20.7%
2014 Q3	1,058	214	55	604	184	20.2%
2014 Q4	1,055	214	55	603	183	20.3%
Calls to mobiles						
2013	8,374	3,148	920	1,862	2,444	37.6%
2014	7,165	2,797	778	1,744	1,847	39.0%
2013 Q4	1,929	730	209	446	544	37.8%
2014 Q1	1,848	706	197	428	517	38.2%
2014 Q2	1,811	711	195	434	472	39.3%
2014 Q3	1,786	702	195	442	448	39.3%
2014 Q4	1,719	678	191	440	410	39.4%
Other calls[1]						
2013	17,857	7,808	1,877	4,337	3,835	43.7%
2014	15,195	6,260	1,611	4,316	3,008	41.2%
2013 Q4	4,202	1,717	456	1,138	892	40.9%
2014 Q1	3,994	1,641	442	1,110	801	41.1%
2014 Q2	3,853	1,567	414	1,088	784	40.7%
2014 Q3	3,780	1,565	400	1,074	741	41.4%
2014 Q4	3,568	1,487	355	1,044	682	41.7%

[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]					
2013	5,900	2,541	937	2,422	43.1%
2014	5,873	2,534	822	2,518	43.1%
2013 Q4	1,449	631	218	600	43.5%
2014 Q1	1,482	662	212	608	44.7%
2014 Q2	1,462	626	207	629	42.8%
2014 Q3	1,458	621	202	635	42.6%
2014 Q4	1,471	624	201	646	42.4%
Access					
2013	3,963	1,589	668	1,707	40.1%
2014	4,109	1,602	599	1,908	39.0%
2013 Q4	981	393	155	432	40.1%
2014 Q1	1,029	426	154	449	41.4%
2014 Q2	1,021	394	151	476	38.6%
2014 Q3	1,020	389	147	484	38.2%
2014 Q4	1,039	392	148	499	37.7%
Calls[1]					
2013	1,936	952	269	715	49.2%
2014	1,764	932	222	610	52.8%
2013 Q4	469	238	63	168	50.7%
2014 Q1	453	236	58	159	52.0%
2014 Q2	442	232	56	154	52.6%
2014 Q3	437	232	55	150	53.0%
2014 Q4	432	232	53	147	53.7%

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
2013	24,970	9,957	4,245	10,768	39.9%
2014	25,494	9,694	4,245	11,554	38.0%
2013 Q4	24,970	9,957	4,245	10,768	39.9%
2014 Q1	25,025	9,908	4,241	10,876	39.6%
2014 Q2	25,144	9,839	4,235	11,071	39.1%
2014 Q3	25,288	9,754	4,226	11,308	38.6%
2014 Q4	25,494	9,694	4,245	11,554	38.0%

Table 8

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

	All Operators	BT[1]	Virgin Media	Other	BT share
2013	63,678	25,218	9,450	29,010	39.6%
2014	55,453	21,687	8,392	25,374	39.1%
2013 Q4	15,160	5,918	2,299	6,943	39.0%
2014 Q1	14,555	5,583	2,227	6,745	38.4%
2014 Q2	13,937	5,532	2,075	6,330	39.7%
2014 Q3	13,537	5,314	2,045	6,178	39.3%
2014 Q4	13,424	5,258	2,045	6,121	39.2%

Table 9

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2013	1,936	673	155	488	620
2014	1,764	577	132	430	625
2013 Q4	469	160	36	117	155
2014 Q1	453	152	34	109	157
2014 Q2	442	142	33	109	157
2014 Q3	437	141	33	108	155
2014 Q4	432	142	32	104	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					
2013	46,191	18,388	7,202	20,601	39.8%
2014	40,510	16,028	6,437	18,045	39.6%
2013 Q4	11,043	4,378	1,750	4,915	39.6%
2014 Q1	10,654	4,129	1,693	4,832	38.8%
2014 Q2	10,151	4,102	1,580	4,469	40.4%
2014 Q3	9,835	3,896	1,569	4,370	39.6%
2014 Q4	9,870	3,901	1,595	4,374	39.5%
International calls					
2013	3,455	622	221	2,612	18.0%
2014	3,013	546	203	2,264	18.1%
2013 Q4	822	148	55	619	18.0%
2014 Q1	796	137	53	606	17.2%
2014 Q2	760	142	51	567	18.7%
2014 Q3	723	132	49	542	18.3%
2014 Q4	735	135	50	550	18.4%
Calls to mobiles					
2013	3,351	1,326	445	1,580	39.6%
2014	2,912	1,159	434	1,319	39.8%
2013 Q4	787	310	114	363	39.4%
2014 Q1	736	284	109	343	38.6%
2014 Q2	743	300	109	334	40.4%
2014 Q3	727	293	108	326	40.3%
2014 Q4	707	282	108	317	39.9%
Other calls[1]					
2013	10,681	4,882	1,582	4,217	45.7%
2014	9,017	3,954	1,318	3,745	43.9%
2013 Q4	2,508	1,082	380	1,046	43.1%
2014 Q1	2,369	1,033	372	964	43.6%
2014 Q2	2,283	988	335	960	43.3%
2014 Q3	2,252	993	319	940	44.1%
2014 Q4	2,112	940	292	880	44.5%

[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]					
2013	2,507	1,330	84	1,093	53.1%
2014	2,267	1,239	77	951	54.7%
2013 Q4	628	340	20	267	54.2%
2014 Q1	597	328	20	250	54.9%
2014 Q2	559	301	18	240	53.8%
2014 Q3	559	305	20	234	54.6%
2014 Q4	551	305	19	227	55.4%
Access					
2013	1,576	983	35	558	62.4%
2014	1,467	917	33	517	62.5%
2013 Q4	405	254	9	143	62.7%
2014 Q1	383	243	8	132	63.3%
2014 Q2	361	224	8	130	61.8%
2014 Q3	360	224	8	129	62.0%
2014 Q4	362	227	8	126	62.8%
Calls[1]					
2013	931	347	49	535	37.3%
2014	799	322	43	434	40.2%
2013 Q4	223	86	12	125	38.6%
2014 Q1	214	85	11	118	39.8%
2014 Q2	198	77	10	110	39.1%
2014 Q3	198	81	11	106	41.1%
2014 Q4	189	78	10	101	41.1%

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
2013	8,345	3,788	507	4,051	45.4%
2014	7,744	3,307	491	3,946	42.7%
2013 Q4	8,345	3,788	507	4,051	45.4%
2014 Q1	8,144	3,615	501	4,028	44.4%
2014 Q2	7,996	3,494	497	4,005	43.7%
2014 Q3	7,829	3,392	497	3,940	43.3%
2014 Q4	7,744	3,307	491	3,946	42.7%

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
2013	28,290	10,383	1,749	8,247	7,910	36.7%
2014	24,810	8,859	1,763	7,847	6,340	35.7%
2013 Q4	6,709	2,345	480	2,031	1,853	35.0%
2014 Q1	6,501	2,320	447	1,959	1,775	35.7%
2014 Q2	6,285	2,223	466	1,970	1,626	35.4%
2014 Q3	6,160	2,199	462	1,963	1,536	35.7%
2014 Q4	5,864	2,117	388	1,955	1,404	36.1%

Table 14

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2013	931	233	116	408	173
2014	799	207	102	333	157
2013 Q4	223	56	29	97	41
2014 Q1	214	54	27	93	40
2014 Q2	198	52	25	80	40
2014 Q3	198	51	25	83	40
2014 Q4	189	50	25	77	38

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						
2013	14,666	5,323	943	4,586	3,813	36.3%
2014	13,111	4,639	1,102	4,360	3,009	35.4%
2013 Q4	3,534	1,221	301	1,128	884	34.6%
2014 Q1	3,440	1,218	282	1,100	840	35.4%
2014 Q2	3,332	1,165	295	1,105	768	35.0%
2014 Q3	3,252	1,150	288	1,087	727	35.4%
2014 Q4	3,087	1,106	237	1,069	675	35.8%
International calls						
2013	1,470	357	36	853	224	24.3%
2014	1,319	327	24	794	175	24.8%
2013 Q4	354	84	8	209	54	23.7%
2014 Q1	336	84	7	198	48	25.0%
2014 Q2	328	82	6	192	48	25.0%
2014 Q3	335	82	6	205	41	24.5%
2014 Q4	320	79	5	199	38	24.7%
Calls to mobiles						
2013	5,023	1,823	475	1,053	1,672	36.3%
2014	4,253	1,638	344	1,022	1,249	38.5%
2013 Q4	1,142	420	95	246	380	36.8%
2014 Q1	1,112	422	88	245	357	37.9%
2014 Q2	1,069	411	86	251	321	38.5%
2014 Q3	1,060	409	87	263	301	38.6%
2014 Q4	1,012	396	83	263	270	39.1%
Other calls*						
2013	7,130	2,880	295	1,755	2,200	40.4%
2014	6,127	2,255	293	1,672	1,907	36.8%
2013 Q4	1,680	620	76	448	535	36.9%
2014 Q1	1,612	596	70	416	530	37.0%
2014 Q2	1,556	565	79	423	489	36.3%
2014 Q3	1,514	558	81	408	467	36.9%
2014 Q4	1,445	536	63	425	421	37.1%

[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
2013	22,807	16,057	4,394	2,356	31.2%
2014	23,730	15,538	4,541	3,651	32.0%
2013 Q4	22,807	16,057	4,394	2,356	31.2%
2014 Q1	23,040	15,891	4,435	2,714	31.6%
2014 Q2	23,219	15,730	4,435	3,053	32.0%
2014 Q3	23,411	15,557	4,484	3,370	31.9%
2014 Q4	23,730	15,538	4,541	3,651	32.0%

3. Mobile telecoms market data tables

Q4 2014 (October to December 2014)

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
2013	15,487	7,826	574	316	694	637	981	1,807	2,651
2014	15,253	8,332	486	375	518	598	915	1,298	2,732
2013 Q4	3,848	2,066	147	73	161	160	225	390	627
2014 Q1	3,749	2,034	124	95	130	147	226	333	659
2014 Q2	3,802	2,047	123	94	132	149	242	328	688
2014 Q3	3,845	2,078	123	93	130	152	236	324	710
2014 Q4	3,857	2,173	115	93	126	150	211	313	676

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
2013	134.68	32.36	40.57	47.04	7.92	1.74	5.04	129.44
2014	137.35	32.07	39.30	51.68	6.97	1.72	5.62	109.63
2013 Q4	35.14	8.39	10.86	12.37	1.84	0.38	1.30	30.84
2014 Q1	33.41	7.90	10.31	12.11	1.53	0.32	1.23	28.31
2014 Q2	34.33	7.87	9.70	12.98	1.88	0.42	1.48	27.91
2014 Q3	34.17	7.97	9.42	12.93	1.81	0.57	1.48	27.02
2014 Q4	35.44	8.33	9.87	13.65	1.75	0.41	1.43	26.39

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
2013	32.89	82.67	46.79	35.88	-0.49	56.6%	4.91
2014	32.06	83.66	49.34	34.32	0.99	59.0%	5.20
2013 Q4	8.24	82.67	46.79	35.88	-0.23	56.6%	4.91
2014 Q1	7.33	82.08	47.38	34.70	-0.59	57.7%	4.91
2014 Q2	7.86	82.21	47.96	34.25	0.13	58.3%	4.96
2014 Q3	8.46	83.10	48.64	34.46	0.89	58.5%	5.09
2014 Q4	8.41	83.66	49.34	34.32	0.56	59.0%	5.20

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
2013	15.59	24.38	5.36
2014	15.38	23.15	4.98
2013 Q4	15.49	23.81	5.34
2014 Q1	15.17	23.21	4.76
2014 Q2	15.43	23.21	4.95
2014 Q3	15.51	23.17	5.16
2014 Q4	15.42	23.03	5.05

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
2013	56.98
2014	66.34
2013 Q4	13.42
2014 Q1	13.11
2014 Q2	17.58
2014 Q3	17.82
2014 Q4	17.83

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