Telecommunications market data tables Q2 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 increased by £20m (0.9%) in Q2 2016 to £2.1bn. This represented an increase of £58m (2.8%) compared to Q2 2015. BT's share of these revenues was 43.9%, in line with a year previously.
- Access revenues accounted for 74.8% of total retail fixed voice revenue in Q2 2016, an increase of 2.9 percentage points compared to a year previously.
- UK fixed lines generated 16.4 billion minutes of outgoing calls in Q2 2016, down 1.0 billion (5.9%) compared to the previous quarter and 2.0 billion (10.6%) less than in Q2 2015.
- The total number of fixed exchange lines (including PSTN lines and ISDN channels) was 33.6 million at the end of Q2 2016, a decrease of 67,000 (0.2%) compared to a year previously.

Fixed broadband

- There were 24.9 million fixed broadband connections at the end of Q2 2016, 684,000 (2.8%) more than there had been a year previously. BT's retail share of these connections was 32.8%, an 0.5 percentage point increase compared to Q2 2015.
- Of these connections, 24.5% (6.1 million) were classified as being 'other inc. FTTx' (almost all of which are fibre broadband connections), an increase of 5.5 percentage points compared to a year previously.

Mobile services

- Mobile telephony services generated £3.8bn in retail revenues in Q2 2016, up £22m (0.6%) compared to the previous quarter and a £37m (1.0%) increase compared to Q2 2015.
- Outgoing mobile call volumes increased by 1.2 billion (3.3%) to 38.1 billion minutes in Q2 2016. This represented an increase of 2.3 billion minutes (6.4%) compared to a year previously.
- The total number of outgoing SMS and MMS messages was 23.7 billion in Q2 2016, a decrease of 0.5 billion messages (2.1%) compared to the previous quarter and a fall of 2.0 billion messages (7.8%) compared to a year previously.
- The number of active mobile subscribers decreased by 0.9 million (1.1%) in the year to Q2 2016, to 83.6 million. Over the same period, the number of dedicated mobile broadband subscriptions (excluding M2M) increased by 0.1 million (2.5%) to 5.5 million.

2. Fixed telecoms market data tables

Q2 2016 (April to June 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 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	2,115	918	210	988	43.4%
2016 Q2	2,135	936	209	990	43.9%
Access					
2014	5,801	2,519	632	2,650	43.4%
2015	6,020	2,469	660	2,891	41.0%
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%
2016 Q2	1,597	639	163	796	40.0%
Calls[1]					
2014	2,637	1,279	266	1,092	48.5%
2015	2,371	1,234	222	915	52.0%
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%
2016 Q2	537	297	46	194	55.4%

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	33,551	13,243	4,737	15,571	39.5%
2015	33,722	12,818	4,744	16,160	38.0%
2015 Q2	33,618	12,990	4,709	15,919	38.6%
2015 Q3	33,613	12,894	4,707	16,011	38.4%
2015 Q4	33,722	12,818	4,744	16,160	38.0%
2016 Q1	33,591	12,713	4,776	16,102	37.8%
2016 Q2	33,551	12,595	4,819	16,137	37.5%

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	73,931	28,389	8,737	23,355	13,450	38.4%
2015 Q2	18,324	7,026	2,155	5,881	3,262	38.3%
2015 Q3	18,035	6,961	2,115	5,648	3,310	38.6%
2015 Q4	17,699	6,797	2,099	5,538	3,266	38.4%
2016 Q1	17,390	6,705	2,066	5,376	3,243	38.6%
2016 Q2	16,373	6,327	1,910	5,077	3,058	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	779	235	763	859
2015	2,371	685	215	660	811
2015 Q2	583	167	53	165	198
2015 Q3	595	166	53	166	209
2015 Q4	581	171	53	157	201
2016 Q1	556	164	51	139	202
2016 Q2	537	154	47	133	203

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	54,590	21,165	7,539	15,318	10,568	38.8%
2015	48,417	19,131	6,651	13,696	8,939	39.5%
2015 Q2	12,026	4,708	1,632	3,459	2,226	39.1%
2015 Q3	11,739	4,631	1,607	3,328	2,173	39.5%
2015 Q4	11,676	4,637	1,624	3,264	2,151	39.7%
2016 Q1	11,374	4,562	1,599	3,115	2,098	40.1%
2016 Q2	10,571	4,259	1,479	2,900	1,933	40.3%
International calls						
2014	4,417	883	227	2,467	840	20.0%
2015	4,051	789	206	2,312	744	19.5%
2015 Q2	1,015	200	50	589	176	19.7%
2015 Q3	977	190	51	546	190	19.4%
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%
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 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	451	477	36.9%
2016 Q2	1,735	646	165	457	468	37.2%
Other calls[1]						
2014	15,562	6,312	1,611	5,472	2,167	40.6%
2015	14,374	5,766	1,160	5,607	1,841	40.1%
2015 Q2	3,517	1,443	296	1,402	376	41.0%
2015 Q3	3,553	1,465	277	1,341	470	41.2%
2015 Q4	3,334	1,323	246	1,302	463	39.7%
2016 Q1	3,366	1,318	245	1,310	493	39.2%
2016 Q2	3,207	1,247	220	1,242	498	38.9%

[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	2,736	41.5%
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	1,546	631	191	724	40.8%
2016 Q2	1,520	618	191	711	40.7%
Access					
2014	4,148	1,602	599	1,947	38.6%
2015	4,462	1,608	624	2,230	36.0%
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	1,183	412	151	620	34.8%
2016 Q2	1,174	407	153	615	34.6%
Calls[1]					
2014	1,759	932	222	605	53.0%
2015	1,594	906	183	505	56.8%
2015 Q2	392	220	46	126	56.1%
2015 Q3	398	226	44	127	56.8%
2015 Q4	391	231	44	117	59.1%
2016 Q1	363	219	40	104	60.4%
2016 Q2	346	212	38	96	61.2%

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	Virgin Media	Other	BT share
2014	25,563	9,694	4,245	11,623	37.9%
2015	26,075	9,528	4,277	12,271	36.5%
2015 Q2	25,792	9,577	4,227	11,989	37.1%
2015 Q3	25,898	9,522	4,234	12,141	36.8%
2015 Q4	26,075	9,528	4,277	12,271	36.5%
2016 Q1	26,008	9,510	4,326	12,172	36.6%
2016 Q2	26,078	9,468	4,375	12,235	36.3%

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	49,999	19,847	7,382	22,770	39.7%
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	12,005	4,778	1,779	5,448	39.8%
2016 Q1	11,765	4,668	1,746	5,351	39.7%
2016 Q2	10,927	4,382	1,618	4,927	40.1%

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	571	132	430	625
2015	1,594	498	123	369	604
2015 Q2	392	120	31	94	148
2015 Q3	398	120	30	93	155
2015 Q4	391	123	32	87	150
2016 Q1	363	116	30	71	145
2016 Q2	346	105	28	68	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	40,197	16,284	6,437	17,476	40.5%
2015	35,591	14,696	5,851	15,044	41.3%
2015 Q2	8,780	3,608	1,438	3,734	41.1%
2015 Q3	8,566	3,526	1,412	3,628	41.2%
2015 Q4	8,640	3,588	1,437	3,615	41.5%
2016 Q1	8,369	3,504	1,411	3,454	41.9%
2016 Q2	7,659	3,243	1,308	3,108	42.3%
International calls					
2014	3,015	548	203	2,264	18.2%
2015	2,750	468	182	2,100	17.0%
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	610	106	44	460	17.4%
2016 Q2	574	103	41	430	18.0%
Calls to mobiles					
2014	2,940	1,187	434	1,319	40.4%
2015	2,739	1,084	388	1,267	39.6%
2015 Q2	675	271	97	307	40.2%
2015 Q3	679	270	95	314	39.8%
2015 Q4	688	264	95	329	38.4%
2016 Q1	687	250	91	346	36.4%
2016 Q2	703	262	88	353	37.2%
Other calls[1]					
2014	9,597	3,965	1,318	4,314	41.3%
2015	8,918	3,599	961	4,358	40.4%
2015 Q2	2,187	903	247	1,037	41.3%
2015 Q3	2,185	908	227	1,050	41.6%
2015 Q4	2,021	814	202	1,005	40.3%
2016 Q1	2,099	808	200	1,091	38.5%
2016 Q2	1,991	774	181	1,036	38.9%

[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	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 Q2	572	286	18	267	50.0%
2015 Q3	583	297	18	268	51.0%
2015 Q4	577	295	19	263	51.1%
2016 Q1	567	283	18	265	50.0%
2016 Q2	612	314	17	280	51.4%
Access					
2014	1,654	917	33	703	55.5%
2015	1,557	861	36	660	55.3%
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	377	204	10	163	54.2%
2016 Q2	423	232	10	181	54.9%
Calls[1]					
2014	852	322	43	487	37.8%
2015	756	307	39	410	40.6%
2015 Q2	184	72	10	103	39.1%
2015 Q3	192	81	9	102	42.0%
2015 Q4	186	80	9	97	42.8%
2016 Q1	190	79	8	103	41.7%
2016 Q2	189	82	8	99	43.4%

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 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	7,583	3,203	450	3,930	42.2%
2016 Q2	7,472	3,127	444	3,901	41.9%

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	23,904	8,504	1,355	7,657	6,389	35.6%
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	5,688	2,012	320	1,828	1,529	35.4%
2016 Q1	5,649	2,031	320	1,744	1,554	36.0%
2016 Q2	5,452	1,939	292	1,712	1,509	35.6%

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	756	188	91	293	185
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
2016 Q2	189	49	19	66	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	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	12,823	4,434	800	4,137	3,453	34.6%
2015 Q2	3,250	1,100	194	1,074	882	33.8%
2015 Q3	3,175	1,105	195	1,018	857	34.8%
2015 Q4	3,029	1,049	187	964	828	34.6%
2016 Q1	2,996	1,058	188	913	837	35.3%
2016 Q2	2,901	1,016	171	901	813	35.0%
International calls						
2014	1,401	335	24	819	223	23.9%
2015	1,292	321	24	715	232	24.8%
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%
2016 Q2	286	72	5	158	50	25.2%
Calls to mobiles						
2014	4,720	1,713	344	1,095	1,568	36.3%
2015	4,349	1,618	332	992	1,407	37.2%
2015 Q2	1,091	404	80	250	357	37.0%
2015 Q3	1,087	404	85	248	349	37.2%
2015 Q4	1,037	386	83	235	333	37.2%
2016 Q1	1,057	394	81	237	345	37.3%
2016 Q2	1,030	384	77	235	334	37.3%
Other calls*						
2014	5,915	2,296	293	1,845	1,481	38.8%
2015	5,440	2,131	199	1,812	1,297	39.2%
2015 Q2	1,327	530	49	447	302	39.9%
2015 Q3	1,362	549	50	449	314	40.3%
2015 Q4	1,318	502	44	463	309	38.1%
2016 Q1	1,301	504	45	436	316	38.7%
2016 Q2	1,235	467	39	418	311	37.8%

[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	24,662	14,497	4,701	5,465	32.4%
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	24,266	13,651	4,771	5,845	33.3%
2016 Q2	24,858	13,946	4,814	6,097	32.8%

3. Mobile telecoms market data tables

Q2 2016 (April to June 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	8,331	486	375	518	598	902	1,298	2,734
2015	15,170	10,297	392	313	428	522	699	764	1,755
2015 Q2	3,771	2,565	100	78	109	132	154	194	438
2015 Q3	3,832	2,583	97	77	106	124	198	191	456
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

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	142.62	33.13	39.47	55.99	6.49	1.90	5.65	101.54
2015 Q2	35.78	8.37	9.82	13.93	1.75	0.47	1.44	25.72
2015 Q3	34.98	8.02	9.56	13.96	1.49	0.57	1.38	25.18
2015 Q4	36.82	8.50	10.36	14.46	1.60	0.50	1.41	24.84
2016 Q1	36.84	8.31	10.28	14.90	1.52	0.47	1.36	24.22
2016 Q2	38.07	8.21	10.61	15.69	1.58	0.51	1.48	23.70

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 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	6.97	83.88	52.03	31.85	-0.85	62.0%	5.50
2016 Q2	7.08	83.57	52.35	31.22	-0.30	62.6%	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	22.81	5.07
2015	15.00	21.84	4.75
2015 Q2	14.97	21.93	4.65
2015 Q3	15.07	21.94	4.75
2015 Q4	15.06	21.57	4.93
2016 Q1	14.97	21.18	4.83
2016 Q2	15.16	21.17	4.92

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 Q2	13.50
2015 Q3	12.94
2015 Q4	13.03
2016 Q1	13.49
2016 Q2	13.77