Telecommunications market data tables Q1 2015

1 – Market monitor

2 – Fixed telecoms market data tables

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Published: **27 August 2015**

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 revenue figures for ‘other’ fixed providers. This is due to Ofcom revising its revenue 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 Q1 2015, a £10m (0.5%) increase compared to the previous quarter and a £41m (1.9%) fall compared to Q1 2014. BT’s share of these revenues was 44.2%, 2.2 percentage points less than it had been a year previously.
- Access revenues accounted for 71.4% of total retail fixed voice revenue in Q1 2015, an increase of 2.8 percentage points compared to a year previously.
- UK fixed lines generated 19.3 billion minutes of outgoing calls in Q1 2015, 1.7 billion minutes (8.3%) less than there had been in Q1 2014.
- The total number of fixed exchange lines (including PSTN lines and ISDN channels) was 33.3 million at the end of Q1 2015, an increase of 96,000 (0.3%) compared to a year previously.

Fixed broadband

- There were 24.0 million fixed broadband connections at the end of Q1 2015, 967,000 (4.2%) more than there had been a year previously. BT’s retail share of these connections was 32.1% at the end of Q1 2015, a 0.5 percentage point increase compared to Q1 2014.
- Of these connections, 17.5% (4.2 million) were classified as being ‘other inc. FTTx’ (almost all of which are fibre broadband connections), an increase of 5.7 percentage points compared to a year previously.

Mobile services

- Mobile telephony services generated £3.73bn in retail revenues in Q1 2015, a £20m (0.5%) decrease compared to Q1 2014 and a £132m (3.4%) decrease compared to the previous quarter.
- Outgoing mobile call volumes rose by 1. 7 billion minutes (5.0%) to 35.1 billion minutes in the year to Q1 2015, but fell by 367 million minutes (1.0%) during the quarter.
- The total number of outgoing SMS and MMS messages was 25.9 billion in Q1 2015, a decrease of 2.4 billion messages (8.5%) compared to Q1 2014 and a fall of 513 million messages (1.9%) compared to the previous quarter
- The number of active mobile subscribers increased by 2.9 million (3.6%) to 85.0 million compared to Q1 2014. The number of dedicated mobile broadband subscriptions (excluding M2M) was 5.2 million in Q1 2015, an increase of 292,000 (6.0%) compared to a year previously.

2. Fixed telecoms market data tables

Q1 2015 (January to March 2015)

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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	8,640	3,903	1,021	3,717	45.2%
2014	8,417	3,798	898	3,720	45.1%
2014 Q1	2,148	996	232	921	46.3%
2014 Q2	2,082	933	225	924	44.8%
2014 Q3	2,089	934	221	934	44.7%
2014 Q4	2,097	937	220	941	44.7%
2015 Q1	2,107	931	220	956	44.2%
Access					
2013	5,741	2,572	703	2,467	44.8%
2014	5,833	2,519	632	2,681	43.2%
2014 Q1	1,476	669	162	645	45.3%
2014 Q2	1,437	617	159	660	43.0%
2014 Q3	1,446	613	155	678	42.4%
2014 Q4	1,474	620	156	698	42.0%
2015 Q1	1,505	621	160	724	41.3%
Calls[1]					
2013	2,899	1,331	318	1,250	45.9%
2014	2,584	1,279	266	1,039	49.5%
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	623	317	63	243	50.9%
2015 Q1	602	310	60	232	51.5%

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	33,348	13,745	4,751	14,851	41.2%
2014	33,329	13,002	4,737	15,591	39.0%
2014 Q1	33,202	13,523	4,742	14,937	40.7%
2014 Q2	33,174	13,333	4,732	15,109	40.2%
2014 Q3	33,151	13,145	4,723	15,283	39.7%
2014 Q4	33,329	13,002	4,737	15,591	39.0%
2015 Q1	33,298	12,840	4,699	15,759	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
2013	92,014	35,646	11,199	25,717	19,452	38.7%
2014	80,312	30,596	10,155	24,648	14,913	38.1%
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	6,101	3,378	38.3%
2015 Q1	19,319	7,350	2,368	6,307	3,295	38.0%

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	2,584	783	235	763	803
2014 Q1	673	206	61	203	203
2014 Q2	645	194	59	189	204
2014 Q3	643	192	58	191	202
2014 Q4	623	191	56	181	195
2015 Q1	602	187	54	172	189

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%
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%
2015 Q1	12,914	4,957	1,788	4,119	2,050	38.4%
International calls						
2013	4,926	979	257	2,598	1,092	19.9%
2014	4,334	874	227	2,441	792	20.2%
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%
2015 Q1	1,080	209	54	637	181	19.3%
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%
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%
2015 Q1	1,706	669	185	448	404	39.2%
Other calls[1]						
2013	17,857	7,808	1,877	4,337	3,835	43.7%
2014	15,195	6,260	1,611	4,348	2,976	41.2%
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	1,076	650	41.7%
2015 Q1	3,620	1,515	341	1,104	660	41.9%

[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]					
2013	5,900	2,541	937	2,423	43.1%
2014	5,907	2,534	822	2,551	42.9%
2014 Q1	1,488	662	212	614	44.5%
2014 Q2	1,466	626	207	633	42.7%
2014 Q3	1,470	621	202	647	42.3%
2014 Q4	1,482	624	201	657	42.1%
2015 Q1	1,516	635	200	681	41.9%
Access					
2013	3,964	1,589	668	1,707	40.1%
2014	4,148	1,602	599	1,947	38.6%
2014 Q1	1,035	426	154	455	41.2%
2014 Q2	1,025	394	151	480	38.4%
2014 Q3	1,033	389	147	497	37.7%
2014 Q4	1,055	392	148	515	37.2%
2015 Q1	1,103	406	152	546	36.8%
Calls[1]					
2013	1,936	952	269	715	49.2%
2014	1,759	932	222	605	53.0%
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	427	232	53	142	54.4%
2015 Q1	413	229	49	135	55.5%

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	25,550	9,694	4,245	11,610	37.9%
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	25,550	9,694	4,245	11,610	37.9%
2015 Q1	25,618	9,633	4,215	11,769	37.6%

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%
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%
2015 Q1	13,451	5,215	1,998	6,238	38.8%

Table 9

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2013	1,936	673	155	488	620
2014	1,759	577	132	430	620
2014 Q1	453	152	34	109	157
2014 Q2	442	142	33	109	157
2014 Q3	437	141	33	108	155
2014 Q4	427	142	32	104	150
2015 Q1	413	137	31	96	149

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%
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%
2015 Q1	9,875	3,856	1,564	4,455	39.0%
International calls					
2013	3,455	622	221	2,612	18.0%
2014	3,013	546	203	2,264	18.1%
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%
2015 Q1	759	126	48	585	16.6%
Calls to mobiles					
2013	3,351	1,326	445	1,580	39.6%
2014	2,912	1,159	434	1,319	39.8%
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%
2015 Q1	687	268	101	318	39.0%
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%
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%
2015 Q1	2,130	965	285	880	45.3%

[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	2,708	1,330	84	1,294	49.1%
2014	2,484	1,239	77	1,169	49.9%
2014 Q1	655	328	20	307	50.1%
2014 Q2	610	301	18	291	49.3%
2014 Q3	612	305	20	287	49.9%
2014 Q4	608	305	19	284	50.2%
2015 Q1	585	290	20	275	49.6%
Access					
2013	1,778	983	35	759	55.3%
2014	1,685	917	33	735	54.4%
2014 Q1	441	243	8	190	55.0%
2014 Q2	412	224	8	181	54.2%
2014 Q3	413	224	8	182	54.1%
2014 Q4	418	227	8	183	54.3%
2015 Q1	402	216	8	178	53.6%
Calls[1]					
2013	931	347	49	535	37.3%
2014	799	322	43	434	40.2%
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%
2015 Q1	183	75	12	97	40.8%

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	8,377	3,788	507	4,083	45.2%
2014	7,780	3,307	491	3,981	42.5%
2014 Q1	8,177	3,615	501	4,061	44.2%
2014 Q2	8,030	3,494	497	4,039	43.5%
2014 Q3	7,864	3,392	497	3,975	43.1%
2014 Q4	7,780	3,307	491	3,981	42.5%
2015 Q1	7,680	3,207	484	3,990	41.8%

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%
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%
2015 Q1	5,859	2,126	370	2,006	1,357	36.3%

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
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
2015 Q1	183	46	23	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%
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%
2015 Q1	3,038	1,101	224	1,092	621	36.2%
International calls						
2013	1,470	357	36	853	224	24.3%
2014	1,319	327	24	794	175	24.8%
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%
2015 Q1	323	84	6	194	39	26.0%
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%
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%
2015 Q1	1,020	401	84	263	272	39.3%
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%
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%
2015 Q1	1,479	540	56	458	425	36.5%

[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
2013	22,807	16,057	4,394	2,356	31.2%
2014	23,730	15,538	4,541	3,651	32.0%
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%
2015 Q1	24,007	15,232	4,568	4,207	32.1%

3. Mobile telecoms market data tables

Q1 2015 (January to March 2015)

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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	15,498	7,826	574	316	694	637	992	1,807	2,651
2014	15,241	8,332	486	375	518	598	901	1,298	2,734
2014 Q1	3,748	2,034	124	95	130	147	226	332	659
2014 Q2	3,794	2,047	123	94	132	149	235	328	688
2014 Q3	3,839	2,078	123	93	130	152	228	324	711
2014 Q4	3,860	2,173	115	93	126	151	212	314	676
2015 Q1	3,728	2,491	105	83	111	138	186	195	420

Note: Includes estimates where Ofcom does not receive data from providers; excludes revenues from interconnection.
The increase in Access and bundled service revenues and decrease in SMS/MMS and Data service revenues were due to an operator improving data submission to align with the report definitions.

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	133.73	32.36	40.57	47.04	7.92	1.74	4.10	129.44
2014	137.36	32.07	39.29	51.59	6.98	1.72	5.71	109.61
2014 Q1	33.41	7.90	10.31	12.11	1.53	0.32	1.24	28.29
2014 Q2	34.32	7.87	9.69	12.95	1.88	0.42	1.50	27.90
2014 Q3	34.17	7.97	9.42	12.90	1.81	0.57	1.51	27.02
2014 Q4	35.45	8.33	9.87	13.63	1.75	0.41	1.46	26.40
2015 Q1	35.08	8.25	9.73	13.66	1.66	0.36	1.42	25.88

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
2014 Q1	7.33	82.08	47.38	34.70	-0.59	57.7%	4.91
2014 Q2	7.86	82.18	47.96	34.22	0.10	58.4%	4.96
2014 Q3	8.46	83.03	48.64	34.39	0.85	58.6%	5.09
2014 Q4	8.41	83.66	49.34	34.32	0.63	59.0%	5.20
2015 Q1	7.25	85.02	49.75	35.27	1.36	58.5%	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	15.60	24.38	5.38
2014	15.37	23.12	5.00
2014 Q1	15.17	23.21	4.75
2014 Q2	15.40	23.15	4.94
2014 Q3	15.49	23.11	5.21
2014 Q4	15.44	23.03	5.09
2015 Q1	14.73	22.05	4.73

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	52.39
2014 Q1	13.11
2014 Q2	12.97
2014 Q3	13.17
2014 Q4	13.13
2015 Q1	12.68

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