Telecommunications market data tables Q2 2017

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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

- UK fixed voice service revenues totalled £2.1bn in Q2 2017, in line with the previous quarter but a decrease of £20m (1.0%) from Q2 2016. BT's share of these revenues (excluding EE) was 43.5%, down by 0.4 percentage points year-on-year.
- Access revenues continued to increase, up by £19m from Q1 2017, while call revenues decreased by £23m over the same period. In Q2 2017 access accounted for 77.2% of total fixed voice service revenues, up 2.4pp year-on-year.
- There were 33.2 million fixed exchange lines (including PSTN and ISDN channels) in Q2 2017, 150k fewer than in Q1 2017 and a 1.3% (449k) decrease compared to a year previously.
- UK landlines generated 13.4 billion minutes of outgoing calls in Q2 2017, a 1.5 billion minute (10%) decline compared to Q1 2017, representing an acceleration in the rate at which outgoing fixed call volumes are falling.

Fixed broadband

- The UK had 25.3 million fixed broadband connections in Q2 2017, up 0.2% (46k) from the previous quarter and 2.0% (508k) from Q2 2016.
- BT (excluding EE)'s retail share of these connections was 32.6%, unchanged from Q1 2017 but a year-on-year decrease of 0.3 percentage points.
- There were 7.5 million "other inc. FTTx" connections (which are predominantly fibre broadband connections) at the end of Q2 2017, accounting for 29.4% of the total. This represented a year-on-year increase of 1.5 million lines (25.7%).

Mobile services

- Mobile telephony services generated £3.8bn in retail revenues in Q2 2017, a £19m (0.5%) increase from the previous quarter and a £40m (1.1%) increase compared to a year previously.
- The number of active mobile subscriptions (excluding M2M connections) was 84.1 million at the end of Q2 2017, up 0.4 million (0.4%) from a year previously. Over the same period, the number of dedicated mobile broadband subscriptions (again, excluding M2M) remained stable at 5.0 million.
- Average revenue per subscriber in Q2 2017 was £15.27, with pay-monthly subscribers generating more revenue than PAYG (at £20.77 and £4.8 respectively).

2. Fixed telecoms market data tables

Q2 2017 (April to June 2017)

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 & Calls[1]					
2015	8,388	3,703	882	3,803	44.2%
2016	8,520	3,753	831	3,936	44.0%
2016 Q2	2,135	936	209	990	43.9%
2016 Q3	2,136	959	207	970	44.9%
2016 Q4	2,132	940	205	986	44.1%
2017 Q1	2,119	924	203	992	43.6%
2017 Q2	2,115	920	195	1,001	43.5%
Access					
2015	6,017	2,469	660	2,888	41.0%
2016	6,357	2,542	650	3,165	40.0%
2016 Q2	1,597	639	163	795	40.0%
2016 Q3	1,595	649	162	783	40.7%
2016 Q4	1,605	638	164	804	39.7%
2017 Q1	1,613	632	166	816	39.2%
2017 Q2	1,632	636	163	834	38.9%
Calls[1]					
2015	2,372	1,234	222	915	52.0%
2016	2,163	1,211	180	771	56.0%
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%
2017 Q2	483	284	32	166	58.9%

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	33,487	12,387	4,891	16,209	37.0%
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	33,487	12,387	4,891	16,209	37.0%
2017 Q1	33,321	12,238	4,811	16,272	36.7%
2017 Q2	33,171	12,102	4,824	16,245	36.5%

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 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	14,920	5,954	1,310	4,592	3,064	39.9%
2017 Q2	13,424	5,306	1,070	4,297	2,751	39.5%

Table 4

Summary of call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2015	2,372	685	215	662	810
2016	2,163	625	187	529	821
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
2017 Q2	483	139	39	113	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 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	9,576	4,017	994	2,770	1,795	41.9%
2017 Q2	8,667	3,630	801	2,533	1,703	41.9%
International calls						
2015	4,052	789	206	2,312	745	19.5%
2016	3,301	675	173	1,813	640	20.4%
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	677	153	31	351	141	22.6%
2017 Q2	627	140	26	336	125	22.3%
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 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	1,684	601	134	499	451	35.7%
2017 Q2	1,586	571	119	478	418	36.0%
Other calls[1]						
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 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	2,983	1,183	151	971	678	39.7%
2017 Q2	2,543	965	124	950	504	37.9%

[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 (exc. EE)	Virgin Media	Other	BT share (exc. EE)
Access & Calls[1]					
2015	6,060	2,514	807	2,740	41.5%
2016	6,174	2,541	761	2,872	41.2%
2016 Q2	1,528	618	191	718	40.5%
2016 Q3	1,545	649	190	706	42.0%
2016 Q4	1,551	643	188	720	41.4%
2017 Q1	1,538	625	185	728	40.6%
2017 Q2	1,561	632	179	750	40.5%
Access					
2015	4,466	1,608	624	2,234	36.0%
2016	4,770	1,669	612	2,490	35.0%
2016 Q2	1,182	407	153	622	34.4%
2016 Q3	1,191	426	153	613	35.7%
2016 Q4	1,210	425	155	630	35.1%
2017 Q1	1,223	421	157	646	34.4%
2017 Q2	1,253	427	154	672	34.1%
Calls[1]					
2015	1,594	906	183	505	56.8%
2016	1,404	872	149	382	62.1%
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%
2017 Q2	309	205	26	78	66.4%

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	26,097	9,528	4,277	12,292	36.5%
2016	26,404	9,404	4,379	12,620	35.6%
2016 Q2	26,283	9,468	4,375	12,440	36.0%
2016 Q3	26,380	9,422	4,429	12,529	35.7%
2016 Q4	26,404	9,404	4,379	12,620	35.6%
2017 Q1	26,417	9,327	4,390	12,699	35.3%
2017 Q2	26,433	9,259	4,414	12,760	35.0%

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 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	9,748	4,118	1,030	4,600	42.2%
2017 Q2	8,736	3,632	836	4,268	41.6%

Table 9

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2015	1,594	498	123	369	604
2016	1,404	428	111	270	596
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
2017 Q2	309	93	22	59	134

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 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	6,842	3,046	834	2,962	44.5%
2017 Q2	6,185	2,745	672	2,768	44.4%
International calls					
2015	2,749	468	182	2,099	17.0%
2016	2,169	398	152	1,619	18.4%
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	420	89	26	305	21.2%
2017 Q2	384	81	22	281	21.1%
Calls to mobiles					
2015	2,735	1,084	388	1,263	39.6%
2016	2,811	1,017	325	1,469	36.2%
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	709	240	54	415	33.9%
2017 Q2	675	227	46	402	33.6%
Other calls[1]					
2015	8,855	3,599	961	4,295	40.6%
2016	7,826	3,126	686	4,014	39.9%
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	1,778	743	116	919	41.8%
2017 Q2	1,492	579	96	817	38.8%

[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 (exc. EE)	Virgin Media	Other	BT share (exc. EE)
Access & Calls[1]					
2015	2,307	1,168	75	1,064	50.6%
2016	2,332	1,198	69	1,064	51.4%
2016 Q2	604	314	17	272	52.1%
2016 Q3	587	306	17	264	52.1%
2016 Q4	578	294	17	267	51.0%
2017 Q1	578	297	17	264	51.3%
2017 Q2	551	285	15	250	51.8%
Access					
2015	1,551	861	36	654	55.5%
2016	1,587	873	38	675	55.0%
2016 Q2	415	232	10	173	56.0%
2016 Q3	403	224	9	170	55.5%
2016 Q4	396	213	9	173	53.8%
2017 Q1	390	211	9	170	54.1%
2017 Q2	380	209	9	162	55.0%
Calls[1]					
2015	756	307	39	410	40.6%
2016	745	325	31	389	43.6%
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%
2017 Q2	171	77	7	88	44.7%

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	7,626	3,291	467	3,868	43.2%
2016	7,083	2,983	511	3,588	42.1%
2016 Q2	7,337	3,127	444	3,765	42.6%
2016 Q3	7,205	3,054	444	3,707	42.4%
2016 Q4	7,083	2,983	511	3,588	42.1%
2017 Q1	6,904	2,910	421	3,573	42.2%
2017 Q2	6,738	2,843	410	3,485	42.2%

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 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%
2017 Q2	4,683	1,670	234	1,388	1,391	35.7%

Table 14

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2015	756	188	91	293	185
2016	745	198	77	259	211
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
2017 Q2	171	47	17	53	55

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 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%
2017 Q2	2,483	885	129	752	716	35.6%
International calls						
2015	1,294	321	24	715	234	24.8%
2016	1,131	277	21	622	211	24.5%
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%
2017 Q2	243	59	4	143	37	24.3%
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 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%
2017 Q2	911	344	73	199	295	37.8%
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 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%
2017 Q2	1,047	382	28	294	343	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 (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 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%
2017 Q2	25,335	12,845	5,032	7,457	32.6%

3. Mobile telecoms market data tables

Q2 2017 (April to June 2017)

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
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 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	3,826	2,822	67	62	74	103	119	162	416
2017 Q2	3,845	2,850	65	61	75	104	115	141	433

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 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	38.37	8.63	11.41	15.08	1.26	0.52	1.48	20.61
2017 Q2	36.07	8.02	10.77	14.09	1.19	0.63	1.37	19.25

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 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	6.67	83.80	54.83	28.98	-0.11	65.4%	5.00
2017 Q2	6.80	84.06	55.24	28.82	0.25	65.7%	4.96

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 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	15.21	20.84	4.68
2017 Q2	15.27	20.77	4.80

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 Q2	14.97
2016 Q3	14.35
2016 Q4	14.56
2017 Q1	14.66
2017 Q2	13.91

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