Telecommunications market data tables Q3 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

- Total fixed telephony revenues were £2.0bn in Q3 2014, a fall of £97m (4.7%) compared to Q3 2013 and £43m (2.1%) during the quarter. BT's share of these revenues was 47.0% during the period, an increase of 1.1 percentage points compared to a year previously.

- Total fixed-originated call volumes across all operators dropped by 528 million minutes (2.6%) to 19.7 billion minutes in Q3 2014. This represented a fall of 2.4 billion minutes (10.9%) compared to Q3 2013.

- The total number of fixed exchange lines (comprising PSTN lines and ISDN channels) was 32.6 million at the end of Q3 2014, a fall of 318,000 (1.0%) from the previous quarter and a 646,000 (1.9%) decline compared to a year previously.

Fixed broadband

- The total number of residential and small business broadband connections increased by 192,000 (0.8%) to 23.4 million in Q3 2014. In the year to Q3 2014 the increase in the number of connections was 927,000 (4.1%).

- The proportion of fixed broadband connections provided using ADSL fell to 66.5% during the quarter, the first time that less than two-thirds of connections were ADSL since 2004. This decline was largely due to an increase in the proportion of 'other' connections (which are almost all fibre), which increased by 1.2pp to 14.4%.

- BT's share of residential and small business broadband connections was 31.9% at the end of Q3 2014, representing a 0.1% fall compared to the previous quarter and a 1.1% increase compared to Q3 2013.

Mobile services

- Estimated retail revenues generated by mobile telephony services increased by £80m (2.1%) to £3.9bn in the year to Q3 2014 and by £62m (1.6%) compared to the previous quarter. Mobile data service revenues increased by £85 million (12.8%) to £752m in the year to Q3 2014 and £30m (4.2%) compared to Q2 2014.

- Outgoing mobile call volumes rose by 520 million minutes (1.5%) to 34.0 billion minutes in the year to Q3 2014, but fell by 170 million minutes (0.5%), from 34.2 billion minutes, during the quarter. Total SMS and MMS message volumes fell by 5.4 billion messages (16.8%) to 26.6 billion messages in the year to Q3 2014.

- The number of active mobile subscribers increased by 897,000 (1.1%) to 84.3 million in the year to Q3 2014, and by 985,000 (1.2%) compared to the previous quarter. The number of dedicated mobile broadband subscriptions (excluding M2M) increased by 2.8% (137,000) to 5.1 million in the year to Q3 2014 and by 130,000 (2.6%) compared to the previous quarter.

2. Fixed telecoms market data tables

Q3 2014 (July to September 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]					
2012	8,583	4,041	1,066	3,476	47.1%
2013	8,438	3,903	1,021	3,515	46.2%
2013 Q3	2,085	956	258	870	45.9%
2013 Q4	2,085	979	239	867	47.0%
2014 Q1	2,085	996	232	858	47.7%
2014 Q2	2,031	933	225	873	45.9%
2014 Q3	1,988	934	221	833	47.0%
Access					
2012	5,346	2,639	677	2,030	49.4%
2013	5,540	2,572	703	2,265	46.4%
2013 Q3	1,367	624	179	563	45.7%
2013 Q4	1,386	647	164	574	46.7%
2014 Q1	1,413	669	162	582	47.4%
2014 Q2	1,385	617	159	609	44.6%
2014 Q3	1,345	613	155	577	45.6%
Calls[1]					
2012	3,237	1,402	389	1,445	43.3%
2013	2,899	1,331	318	1,250	45.9%
2013 Q3	718	332	79	307	46.3%
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%

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
2012	33,215	14,504	4,838	13,873	43.7%
2013	33,316	13,745	4,751	14,819	41.3%
2013 Q3	33,222	13,886	4,761	14,575	41.8%
2013 Q4	33,316	13,745	4,751	14,819	41.3%
2014 Q1	32,990	13,344	4,742	14,904	40.4%
2014 Q2	32,893	13,086	4,732	15,076	39.8%
2014 Q3	32,575	12,604	4,723	15,248	38.7%

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
2012	103,136	39,728	12,712	25,888	24,808	38.5%
2013	92,014	35,646	11,199	25,717	19,452	38.7%
2013 Q3	22,110	8,537	2,663	6,317	4,592	38.6%
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	19,709	7,526	2,507	6,089	3,587	38.2%

Table 4

Summary of call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2012	3,237	988	330	1,032	887
2013	2,899	906	271	897	824
2013 Q3	718	221	67	225	206
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

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						
2012	69,030	27,162	9,387	17,263	15,217	39.3%
2013	60,857	23,711	8,145	16,920	12,081	39.0%
2013 Q3	14,392	5,580	1,862	4,129	2,821	38.8%
2013 Q4	14,577	5,599	2,051	4,217	2,710	38.4%
2014 Q1	14,093	5,346	1,975	4,151	2,620	37.9%
2014 Q2	13,484	5,267	1,875	4,013	2,329	39.1%
2014 Q3	13,085	5,045	1,857	3,969	2,214	38.6%
International calls						
2012	5,868	1,176	275	2,638	1,779	20.0%
2013	4,926	979	257	2,598	1,092	19.9%
2013 Q3	1,196	235	62	646	253	19.6%
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	1,055	214	55	604	182	20.3%
Calls to mobiles						
2012	9,391	3,622	801	1,862	3,107	38.6%
2013	8,374	3,148	920	1,862	2,444	37.6%
2013 Q3	2,128	763	296	479	591	35.9%
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%
Other calls[1]						
2012	18,848	7,768	2,249	4,126	4,705	41.2%
2013	17,857	7,808	1,877	4,337	3,835	43.7%
2013 Q3	4,393	1,959	443	1,063	928	44.6%
2013 Q4	4,202	1,717	456	1,138	892	40.9%
2014 Q1	3,994	1,641	442	1,109	802	41.1%
2014 Q2	3,853	1,567	414	1,088	784	40.7%
2014 Q3	3,782	1,565	400	1,074	743	41.4%

[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]					
2012	5,851	2,603	976	2,272	44.5%
2013	5,900	2,541	937	2,422	43.1%
2013 Q3	1,469	631	236	602	43.0%
2013 Q4	1,449	631	218	600	43.5%
2014 Q1	1,482	662	212	608	44.7%
2014 Q2	1,466	626	207	633	42.7%
2014 Q3	1,427	621	202	603	43.6%
Access					
2012	3,706	1,591	639	1,476	42.9%
2013	3,963	1,589	668	1,707	40.1%
2013 Q3	992	395	170	426	39.9%
2013 Q4	981	393	155	432	40.1%
2014 Q1	1,029	426	154	449	41.4%
2014 Q2	1,024	394	151	479	38.5%
2014 Q3	989	389	147	453	39.4%
Calls[1]					
2012	2,145	1,012	337	796	47.2%
2013	1,936	952	269	715	49.2%
2013 Q3	477	235	66	176	49.3%
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%

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
2012	24,462	10,341	4,322	9,799	42.3%
2013	24,970	9,957	4,245	10,768	39.9%
2013 Q3	24,796	10,028	4,258	10,510	40.4%
2013 Q4	24,970	9,957	4,245	10,768	39.9%
2014 Q1	24,846	9,729	4,241	10,876	39.2%
2014 Q2	24,897	9,592	4,235	11,071	38.5%
2014 Q3	24,746	9,212	4,226	11,308	37.2%

Table 8
Summary of residential call volumes by operator (millions of minutes)

	All Operators	BT[1]	Virgin Media	Other	BT share
2012	71,503	28,310	10,614	32,579	39.6%
2013	63,678	25,218	9,450	29,010	39.6%
2013 Q3	15,252	5,995	2,271	6,986	39.3%
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	13,536	5,314	2,045	6,177	39.3%

Table 9

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2012	2,145	723	198	566	659
2013	1,936	673	155	488	620
2013 Q3	477	164	38	122	154
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

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					
2012	51,985	21,051	8,062	22,872	40.5%
2013	46,191	18,388	7,202	20,601	39.8%
2013 Q3	10,912	4,300	1,715	4,897	39.4%
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	9,834	3,896	1,569	4,369	39.6%
International calls					
2012	4,111	743	239	3,129	18.1%
2013	3,455	622	221	2,612	18.0%
2013 Q3	830	148	53	629	17.8%
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%
Calls to mobiles					
2012	3,902	1,598	453	1,851	41.0%
2013	3,351	1,326	445	1,580	39.6%
2013 Q3	828	323	113	392	39.0%
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%
Other calls[1]					
2012	11,506	4,918	1,860	4,728	42.7%
2013	10,681	4,882	1,582	4,217	45.7%
2013 Q3	2,682	1,224	390	1,068	45.6%
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%

[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]					
2012	2,696	1,402	90	1,203	52.0%
2013	2,507	1,330	84	1,093	53.1%
2013 Q3	608	317	22	269	52.2%
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	554	305	20	229	55.1%
Access					
2012	1,640	1,048	38	554	63.9%
2013	1,576	983	35	558	62.4%
2013 Q3	375	229	9	138	60.9%
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	355	224	8	123	62.9%
Calls[1]					
2012	1,056	354	52	649	33.6%
2013	931	347	49	535	37.3%
2013 Q3	233	89	13	131	38.1%
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%

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
2012	8,754	4,162	517	4,074	47.6%
2013	8,345	3,788	507	4,051	45.4%
2013 Q3	8,426	3,858	503	4,065	45.8%
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%

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
2012	31,571	11,354	2,098	8,504	9,615	36.0%
2013	28,290	10,383	1,749	8,247	7,910	36.7%
2013 Q3	6,843	2,527	392	1,991	1,933	36.9%
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%

Table 14

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2012	1,056	265	132	466	193
2013	931	233	116	408	173
2013 Q3	233	57	29	103	44
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

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						
2012	17,045	6,110	1,325	4,893	4,717	35.8%
2013	14,666	5,323	943	4,586	3,813	36.3%
2013 Q3	3,480	1,280	147	1,126	927	36.8%
2013 Q4	3,534	1,221	301	1,128	884	34.6%
2014 Q1	3,440	1,218	282	1,101	839	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%
International calls						
2012	1,756	433	36	890	398	24.7%
2013	1,470	357	36	853	224	24.3%
2013 Q3	366	87	9	215	55	23.7%
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	332	82	6	205	39	24.7%
Calls to mobiles						
2012	5,490	2,024	348	1,024	2,094	36.9%
2013	5,023	1,823	475	1,053	1,672	36.3%
2013 Q3	1,302	441	183	274	404	33.9%
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%
Other calls*						
2012	7,280	2,787	389	1,698	2,406	38.3%
2013	7,130	2,880	295	1,755	2,200	40.4%
2013 Q3	1,695	719	53	376	547	42.4%
2013 Q4	1,680	620	76	448	535	36.9%
2014 Q1	1,612	596	70	415	531	37.0%
2014 Q2	1,556	565	79	423	489	36.3%
2014 Q3	1,516	558	81	408	469	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
2012	21,842	16,408	4,290	1,144	30.1%
2013	22,807	16,057	4,394	2,356	31.2%
2013 Q3	22,484	16,107	4,355	2,022	30.9%
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%

3. Mobile telecoms market data tables

Q3 2014 (July to September 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
2012	15,905	7,311	639	420	924	594	1,093	2,420	2,506
2013	15,527	7,843	577	319	698	639	984	1,815	2,653
2013 Q3	3,857	1,952	142	77	173	164	272	411	667
2013 Q4	3,863	2,071	148	75	163	160	226	393	627
2014 Q1	3,806	2,042	146	68	151	148	221	351	680
2014 Q2	3,876	2,065	145	67	151	146	232	349	722
2014 Q3	3,936	2,097	145	67	150	152	226	348	751

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
2012	132.29	31.47	41.62	43.60	7.86	1.68	6.06	151.24
2013	135.11	32.44	40.73	47.20	7.93	1.74	5.07	129.86
2013 Q3	33.50	8.01	9.82	11.77	1.96	0.54	1.40	31.93
2013 Q4	35.28	8.41	10.92	12.42	1.84	0.38	1.31	30.98
2014 Q1	33.45	8.03	9.69	12.41	1.76	0.33	1.23	28.61
2014 Q2	34.19	7.89	9.67	12.90	1.85	0.63	1.26	27.48
2014 Q3	34.02	7.95	9.40	12.89	1.78	0.74	1.26	26.57

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
2012	34.15	83.40	43.54	39.86	1.02	52.2%	5.07
2013	32.89	83.58	46.92	36.67	0.18	56.1%	4.91
2013 Q3	8.62	83.43	46.07	37.37	0.55	55.2%	4.95
2013 Q4	8.24	83.58	46.92	36.67	0.15	56.1%	4.91
2014 Q1	7.25	82.89	47.52	35.38	-0.69	57.3%	4.91
2014 Q2	7.88	83.34	48.29	35.05	0.45	57.9%	4.96
2014 Q3	8.46	84.33	48.81	35.52	0.98	57.9%	5.09

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
2012	16.13	26.09	5.92
2013	15.55	23.90	5.47
2013 Q3	15.46	23.70	5.44
2013 Q4	15.42	23.36	5.44
2014 Q1	15.24	23.03	5.03
2014 Q2	15.54	23.15	5.20
2014 Q3	15.65	23.14	5.35

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
2012	59.15
2013	56.98
2013 Q3	13.53
2013 Q4	13.42
2014 Q1	13.11
2014 Q2	12.97
2014 Q3	13.17

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