Telecommunications Market Data Update

Q4 2023

Report

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Contents

Section

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 £1.30bn in Q4 2023; an increase of £3.0m (0.2%) from the previous quarter and a decrease of £91.9m (6.6%) year-on-year. BT's share of these revenues was 51.4%.
- The total number of fixed lines (including PSTN lines, ISDN channels and managed VoIP connections) fell by 967k (3.5%) during the quarter to 26.6 million.
- Total fixed-originated call volumes fell by 1403 million minutes (20.6%) year on year, to 5.42 billion minutes.

Fixed broadband services

- There were 28.2 million fixed broadband lines at the end of Q4 2023, an increase of 38k (0.1%) year on year.
- There were 20.4 million 'other inc. FTTx' broadband connections (predominantly fibre-to-the-cabinet and full fibre connections) at the end of Q4 2023, accounting for 72.2% of all lines.
- The number of ADSL lines decreased by 120k (5.0%) during the quarter, while the number of cable lines increased by 86k (1.6%) and the number of 'other inc. FTTx' lines grew by 136k (0.7%).

Mobile services

- Mobile telephony services generated £3.49bn in retail revenues in Q4 2023, a £215.3m (6.6%) increase from a year previously.
- The number of active mobile subscriptions (excluding M2M) was 89.2 million at the end of Q4 2023, up 2.5 million (2.9%) from the year before.
- Over the same period, the number of dedicated mobile broadband subscriptions decreased by 145k (2.9%) to 4.8 million.
- Average monthly retail revenue per subscriber was £13.05 in Q4 2023, with post-pay subscribers generating more revenue than pre-pay users (averaging £15.79 compared to £5.33 for pre-pay).
- The number of mobile-originated voice call minutes fell by 274.3 million (0.7%) to 41.82 billion minutes year-on-year, with calls to landlines decreasing by 13.5% to 7.39 billion minutes.
- The number of mobile messages (including SMS and MMS) saw a year-on-year decline, down 0.98 billion messages (11.1%) to 7.82 billion.
- Data usage grew, with volumes up 324 PB (15.1%) year-on-year to 2474 PB.

2. Fixed Telecoms market data tables

Q4 2023 (October to December)

List of tables in this section

Note: The data in these tables is 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 (£millions)

	All Operators	BT	Virgin Media	Other	BT Share
Access & calls[1]					
2022	5,694	2,780	913	2,001	48.8%
2023	5,243	2,616	840	1,788	49.9%
2022 Q4	1,391	680	223	488	48.9%
2023 Q1	1,331	655	219	458	49.2%
2023 Q2	1,316	653	213	450	49.6%
2023 Q3	1,297	640	208	449	49.4%
2023 Q4	1,300	668	201	430	51.4%
Access[1]					
2022	5,152	2,571	863	1,718	49.9%
2023	4,791	2,453	804	1,534	51.2%
2022 Q4	1,262	632	212	417	50.1%
2023 Q1	1,212	612	208	392	50.5%
2023 Q2	1,197	607	203	386	50.7%
2023 Q3	1,186	601	199	386	50.7%
2023 Q4	1,195	632	194	370	52.8%
Calls					
2022	542	210	50	282	38.7%
2023	453	163	36	254	36.0%
2022 Q4	130	48	11	71	36.9%
2023 Q1	119	43	10	66	35.8%
2023 Q2	119	46	9	64	38.6%
2023 Q3	111	38	9	63	34.8%
2023 Q4	104	36	8	60	34.5%

Notes: 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 (000's)

	All Operators	BT	Virgin Media	Other	BT Share
2022	30,101	11,031	4,311	14,759	36.6%
2023	26,627	9,552	3,884	13,191	35.9%
2022 Q4	30,101	11,031	4,311	14,759	36.6%
2023 Q1	29,426	10,793	4,236	14,397	36.7%
2023 Q2	28,565	10,435	4,087	14,043	36.5%
2023 Q3	27,594	9,996	3,966	13,632	36.2%
2023 Q4	26,627	9,552	3,884	13,191	35.9%

Table 3: Summary of call volumes (millions of minutes)

	All Operators	BT	Virgin Media	Other	BT Share
2022	29,189	12,294	3,272	13,623	42.1%
2023	23,289	9,968	2,456	10,865	42.8%
2022 Q4	6,828	2,894	746	3,188	42.4%
2023 Q1	6,489	2,759	691	3,039	42.5%
2023 Q2	5,693	2,384	608	2,701	41.9%
2023 Q3	5,683	2,449	604	2,630	43.1%
2023 Q4	5,424	2,376	553	2,495	43.8%

Table 4: Summary of call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2022	542	184	52	167	155
2023	453	144	52	134	126
2022 Q4	130	43	13	38	37
2023 Q1	119	38	13	35	34
2023 Q2	119	38	13	35	34
2023 Q3	111	35	13	33	31
2023 Q4	104	33	13	31	28

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 (millions of minutes)

	All Operators	BT	Virgin Media	Other	BT Share
UK geographic calls					
2022	19,045	8,429	2,244	8,372	44.3%
2023	14,857	6,645	1,658	6,554	44.7%
2022 Q4	4,424	1,974	507	1,943	44.6%
2023 Q1	4,178	1,861	471	1,846	44.5%
2023 Q2	3,632	1,577	412	1,643	43.4%
2023 Q3	3,596	1,619	401	1,576	45.0%
2023 Q4	3,451	1,588	374	1,489	46.0%
International calls					
2022	937	179	54	704	19.1%
2023	781	134	38	609	17.2%
2022 Q4	216	41	12	163	19.0%
2023 Q1	212	39	11	162	18.4%
2023 Q2	195	32	10	153	16.4%
2023 Q3	189	32	8	149	16.9%
2023 Q4	186	31	9	146	16.7%
Calls to mobiles					
2022	5,555	2,029	527	2,999	36.5%
2023	4,812	1,773	436	2,603	36.8%
2022 Q4	1,303	478	125	700	36.7%
2023 Q1	1,280	471	115	694	36.8%
2023 Q2	1,171	422	106	643	36.1%
2023 Q3	1,199	441	114	644	36.8%
2023 Q4	1,162	439	101	622	37.8%
Other calls[1]					
2022	3,651	1,657	447	1,547	45.4%
2023	2,839	1,416	324	1,099	49.9%
2022 Q4	885	401	102	382	45.3%
2023 Q1	819	388	94	337	47.4%
2023 Q2	696	353	80	263	50.7%
2023 Q3	698	357	81	260	51.1%
2023 Q4	625	318	69	238	50.9%

[1]*Includes freephone, special services, premium rate, directory enquiries and all other call types.*

Table 6: Summary of residential network access & call revenues (£millions)

	All Operators	BT	Virgin Media	Other	BT Share
Access & calls[1]					
2022	4,520	2,216	883	1,421	49.0%
2023	4,174	2,104	817	1,252	50.4%
2022 Q4	1,102	543	216	343	49.3%
2023 Q1	1,056	524	212	319	49.6%
2023 Q2	1,040	522	207	311	50.2%
2023 Q3	1,024	514	202	309	50.1%
2023 Q4	1,053	544	196	313	51.6%
Access[1]					
2022	4,209	2,087	843	1,279	49.6%
2023	3,917	1,994	788	1,135	50.9%
2022 Q4	1,029	513	207	309	49.8%
2023 Q1	988	496	204	288	50.2%
2023 Q2	969	489	199	281	50.5%
2023 Q3	965	489	195	281	50.7%
2023 Q4	995	520	190	285	52.3%
Calls					
2022	310	129	40	142	41.4%
2023	257	110	29	118	42.8%
2022 Q4	73	31	9	34	41.6%
2023 Q1	68	28	8	32	41.2%
2023 Q2	71	33	8	30	47.1%
2023 Q3	60	25	7	28	41.0%
2023 Q4	58	24	6	28	41.2%

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 (000's)

	All Operators	BT	Virgin Media	Other	BT Share
2022	23,955	7,924	4,156	11,874	33.1%
2023	21,097	6,525	3,803	10,769	30.9%
2022 Q4	23,955	7,924	4,156	11,874	33.1%
2023 Q1	23,310	7,655	4,094	11,561	32.8%
2023 Q2	22,599	7,342	3,980	11,277	32.5%
2023 Q3	21,738	6,959	3,875	10,903	32.0%
2023 Q4	21,097	6,525	3,803	10,769	30.9%

Table 8: Summary of residential call volumes (millions of minutes)

	All Operators	BT	Virgin Media	Other	BT Share
2022	18,886	8,545	2,737	7,604	45.2%
2023	14,519	6,724	2,035	5,760	46.3%
2022 Q4	4,381	2,011	621	1,749	45.9%
2023 Q1	4,096	1,876	579	1,641	45.8%
2023 Q2	3,557	1,591	507	1,459	44.7%
2023 Q3	3,472	1,637	487	1,348	47.1%
2023 Q4	3,394	1,620	462	1,312	47.7%

Table 9: Summary of residential call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2022	310	132	32	63	84
2023	257	106	28	52	71
2022 Q4	73	31	8	15	21
2023 Q1	68	28	7	13	19
2023 Q2	71	29	8	15	19
2023 Q3	60	25	6	12	16
2023 Q4	58	24	6	12	16

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 (millions of minutes)

	All Operators	BT	Virgin Media	Other	BT Share
UK geographic calls					
2022	13,787	6,328	2,036	5,423	45.9%
2023	10,279	4,767	1,494	4,018	46.4%
2022 Q4	3,171	1,469	459	1,243	46.3%
2023 Q1	2,945	1,355	427	1,163	46.0%
2023 Q2	2,506	1,122	372	1,012	44.8%
2023 Q3	2,438	1,150	356	932	47.2%
2023 Q4	2,389	1,140	339	910	47.7%
International calls					
2022	526	135	52	339	25.7%
2023	415	97	38	280	23.4%
2022 Q4	120	31	12	77	25.7%
2023 Q1	117	29	11	77	24.7%
2023 Q2	105	23	10	72	21.9%
2023 Q3	97	23	8	66	23.8%
2023 Q4	96	22	9	65	22.9%
Calls to mobiles					
2022	2,047	841	278	928	41.1%
2023	1,780	765	233	782	43.0%
2022 Q4	495	208	66	221	42.1%
2023 Q1	471	198	62	211	42.1%
2023 Q2	436	178	58	200	40.8%
2023 Q3	434	191	57	186	44.0%
2023 Q4	439	198	56	185	45.1%
Other calls[1]					
2022	2,527	1,241	371	915	49.1%
2023	2,046	1,095	270	681	53.5%
2022 Q4	595	303	84	208	50.9%
2023 Q1	562	294	79	189	52.3%
2023 Q2	510	268	67	175	52.6%
2023 Q3	504	273	66	165	54.2%
2023 Q4	470	260	58	152	55.4%

[1]*Includes freephone, special services, premium rate, directory enquiries and all other call types.*

Table 11: Summary of business network access & call revenues (£millions)

	All Operators	BT	Virgin Media	Other	BT Share
Access & calls[1]					
2022	1,174	565	29	580	48.1%
2023	1,069	511	23	535	47.8%
2022 Q4	289	137	7	145	47.4%
2023 Q1	275	131	6	139	47.4%
2023 Q2	276	131	6	139	47.4%
2023 Q3	272	126	6	140	46.4%
2023 Q4	246	124	5	117	50.2%
Access[1]					
2022	942	483	20	439	51.3%
2023	873	458	16	399	52.5%
2022 Q4	233	120	5	108	51.5%
2023 Q1	224	116	4	104	51.7%
2023 Q2	228	118	4	105	52.0%
2023 Q3	221	112	4	105	50.7%
2023 Q4	200	112	4	85	55.8%
Calls					
2022	231	81	9	141	35.0%
2023	196	53	7	136	27.1%
2022 Q4	56	17	2	37	30.6%
2023 Q1	52	15	2	35	28.9%
2023 Q2	48	13	2	34	26.0%
2023 Q3	51	14	2	35	27.5%
2023 Q4	46	12	1	33	25.9%

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 (000's)

	All Operators	BT	Virgin Media	Other	BT Share
2022	6,145	3,107	154	2,885	50.6%
2023	5,530	3,027	81	2,422	54.7%
2022 Q4	6,145	3,107	154	2,885	50.6%
2023 Q1	6,116	3,138	142	2,836	51.3%
2023 Q2	5,966	3,093	107	2,766	51.8%
2023 Q3	5,856	3,037	90	2,729	51.9%
2023 Q4	5,530	3,027	81	2,422	54.7%

Table 13: Summary of business call volumes (millions of minutes)

	All Operators	BT	Virgin Media	Other	BT Share
2022	10,298	3,745	535	6,018	36.4%
2023	8,767	3,241	421	5,105	37.0%
2022 Q4	2,446	882	125	1,439	36.1%
2023 Q1	2,392	882	112	1,398	36.9%
2023 Q2	2,136	793	101	1,242	37.1%
2023 Q3	2,209	811	117	1,281	36.7%
2023 Q4	2,029	755	91	1,183	37.2%

Table 14: Summary of business call revenues by call type (£millions)

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2022	231	52	20	104	68
2023	196	38	24	82	54
2022 Q4	56	12	5	23	16
2023 Q1	52	10	5	22	14
2023 Q2	48	9	5	20	14
2023 Q3	51	10	7	21	14
2023 Q4	46	9	7	19	12

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 (millions of minutes)

	All Operators	BT	Virgin Media	Other	BT Share
UK geographic calls					
2022	5,258	2,101	208	2,949	40.0%
2023	4,578	1,878	164	2,536	41.0%
2022 Q4	1,253	505	48	700	40.3%
2023 Q1	1,233	506	44	683	41.0%
2023 Q2	1,125	455	40	630	40.4%
2023 Q3	1,158	469	45	644	40.5%
2023 Q4	1,062	448	35	579	42.2%
International calls					
2022	412	44	2	366	10.7%
2023	367	37	0	330	10.1%
2022 Q4	95	10	0	85	10.5%
2023 Q1	94	10	0	84	10.6%
2023 Q2	90	9	0	81	10.0%
2023 Q3	93	9	0	84	9.7%
2023 Q4	90	9	0	81	10.0%
Calls to mobiles					
2022	3,509	1,188	249	2,072	33.9%
2023	3,031	1,008	203	1,820	33.3%
2022 Q4	809	270	59	480	33.4%
2023 Q1	809	273	53	483	33.7%
2023 Q2	734	244	48	442	33.2%
2023 Q3	765	250	57	458	32.7%
2023 Q4	723	241	45	437	33.3%
Other calls[1]					
2022	1,120	412	76	632	36.8%
2023	790	318	54	418	40.2%
2022 Q4	289	97	18	174	33.6%
2023 Q1	256	93	15	148	36.4%
2023 Q2	187	85	13	89	45.6%
2023 Q3	194	83	15	96	42.9%
2023 Q4	155	57	11	87	36.9%

[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)

	Total	ADSL	Cable	Other (inc. FTTx)	BT retail Share
2022	28,149	2,833	5,440	19,876	32.9%
2023	28,188	2,299	5,533	20,355	32.0%
2022 Q4	28,149	2,833	5,440	19,876	32.9%
2023 Q1	28,194	2,657	5,465	20,072	32.8%
2023 Q2	28,102	2,538	5,419	20,146	32.5%
2023 Q3	28,085	2,419	5,447	20,220	32.2%
2023 Q4	28,188	2,299	5,533	20,355	32.0%

Note: Other (inc FTTx) figures have been restated to reflect more accurate data, however, they are likely to be understated as Ofcom does not collect data from all UK altnet full-fibre providers. We are currently engaging with industry to improve the coverage of this data.

3. Mobile Telecoms market data tables

Q4 2023 (October to December)

List of tables in this section

Note: The data in these tables is 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
2022	12,977	10,653	55	60	70	131	146	440	1,422
2023	13,675	11,322	43	56	65	117	169	424	1,480
2022 Q4	3,273	2,663	13	15	17	32	39	118	375
2023 Q1	3,179	2,629	12	14	16	30	35	99	345
2023 Q2	3,482	2,892	11	14	16	30	42	105	372
2023 Q3	3,525	2,909	10	14	16	29	51	106	389
2023 Q4	3,488	2,892	9	14	16	28	42	114	373

Note: From 2018, bundled revenues are reported according to the new IFRS15 accounting standard, and they do not include any device revenues.

Table 2: Call, message, and data volumes by call type (billions of minutes/billions of messages/PB)

	All calls	UK fixed calls	On-net mobile calls	Off-net mobile calls	Int'l calls	Calls when roaming	Other calls	SMS & MMS messages	Data
2022	171.08	35.25	50.23	76.35	1.77	1.81	5.67	36.63	7,576
2023	164.77	29.63	48.70	77.96	1.85	1.72	4.91	31.68	9,405
2022 Q4	42.10	8.54	12.41	18.97	0.40	0.39	1.39	8.80	2,150
2023 Q1	42.10	7.77	12.26	19.84	0.50	0.37	1.37	8.15	2,201
2023 Q2	40.51	7.18	11.91	19.21	0.49	0.45	1.28	7.94	2,294
2023 Q3	40.34	7.30	11.94	18.93	0.44	0.55	1.17	7.79	2,437
2023 Q4	41.82	7.39	12.59	19.97	0.42	0.36	1.10	7.82	2,474

Note: Includes estimates where Ofcom does not receive data from providers

Table 3: Subscriber numbers by type (millions)

	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 broadband subs at end of period
2022	86.66	64.26	22.40	1.89	74.15%	4.96
2023	89.16	66.16	23.00	2.49	74.21%	4.82
2022 Q4	86.66	64.26	22.40	-0.47	74.15%	4.96
2023 Q1	86.82	64.44	22.38	0.15	74.22%	4.88
2023 Q2	87.45	64.60	22.86	0.63	73.87%	4.92
2023 Q3	88.97	65.32	23.65	1.52	73.42%	4.80
2023 Q4	89.16	66.16	23.00	0.18	74.21%	4.82

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
2022	12.52	15.01	5.21
2023	12.98	15.73	5.18
2022 Q4	12.55	15.11	5.28
2023 Q1	12.22	14.72	5.03
2023 Q2	13.32	16.18	5.16
2023 Q3	13.32	16.23	5.19
2023 Q4	13.05	15.79	5.33

Table 5: Interconnection call volumes (billions of minutes)

	All operators
2022	61.24
2023	62.54
2022 Q4	15.83
2023 Q1	16.31
2023 Q2	15.54
2023 Q3	15.17
2023 Q4	15.52

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