



# Telecommunications Market Data Update

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Q2 2024

**Report**

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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 £1.19bn in Q2 2024; a decrease of £44.0m (3.6%) from the previous quarter and £122.7m (9.3%) year-on-year. BT's share of these revenues was 50.8%.
- The total number of fixed voice lines (including PSTN lines, ISDN channels and managed VoIP connections) fell by 666k (2.6%) during the quarter to 25.4 million. Year-on-year, the number of fixed lines was down by 3.1 million (10.8%).
- Total fixed-originated call volumes decreased by 1.22 billion minutes (21.5%) year on year, to 4.46 billion minutes.

## Fixed broadband services

**We have added around 20 broadband providers to our data collection programme, with Q2 2024 being the first quarter for which they submitted data. As a result, the total and 'other inc. FTTx' fixed broadband lines figures for Q2 2024 are not comparable to those for previous periods.**

- There were 29.0 million UK fixed broadband lines at the end of Q2 2024.
- Of these, 21.6 million were 'other inc. FTTx' broadband connections (predominantly fibre-to-the-cabinet and full fibre connections), accounting for 74.4% of all lines.
- The number of ADSL lines declined by 119k (5.4%) during the quarter, while the number of cable lines fell by 41k (0.8%).

## Mobile services

- Mobile telephony services generated £3.58bn in retail revenues in Q2 2024, a £97.2m (2.8%) increase from a year previously.
- Average monthly retail revenue per subscriber was £13.36 in Q2 2024, with post-pay subscribers generating more revenue than pre-pay users (averaging £16.08 compared to £5.47 for pre-pay).
- The number of active mobile subscriptions (excluding M2M) was 89.6 million at the end of Q2 2024, up 2.1 million (2.4%) from the year before.
- Over the same period, the number of dedicated mobile broadband subscriptions decreased by 305k (6.2%) to 4.6 million.
- The number of mobile-originated voice call minutes decreased by 1.01 billion (2.5%) to 39.50 billion minutes year-on-year, with calls to landlines decreasing by 4.4% to 6.86 billion minutes.
- The number of mobile messages (including SMS and MMS) saw a year-on-year decline, down 0.90 billion messages (11.3%) to 7.04 billion.
- Data usage grew, with volumes up 315 PB (13.7%) year-on-year to 2609 PB.

## 2. Fixed Telecoms market data tables

### Q2 2024 (April to June)

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*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
<b>Access &amp; calls<sup>1</sup></b>					
<b>2022</b>	5,690	2,784	913	1,994	48.9%
<b>2023</b>	5,236	2,617	840	1,778	50.0%
<b>2023 Q2</b>	1,313	654	213	447	49.8%
<b>2023 Q3</b>	1,295	640	208	447	49.5%
<b>2023 Q4</b>	1,298	668	201	429	51.5%
<b>2024 Q1</b>	1,235	632	195	408	51.2%
<b>2024 Q2</b>	1,191	605	189	396	50.8%
<b>Access<sup>1</sup></b>					
<b>2022</b>	5,146	2,571	863	1,712	50.0%
<b>2023</b>	4,781	2,453	804	1,524	51.3%
<b>2023 Q2</b>	1,194	607	203	383	50.9%
<b>2023 Q3</b>	1,184	601	199	384	50.8%
<b>2023 Q4</b>	1,193	632	194	368	52.9%
<b>2024 Q1</b>	1,137	599	188	350	52.7%
<b>2024 Q2</b>	1,098	573	183	341	52.2%
<b>Calls</b>					
<b>2022</b>	544	213	50	282	39.1%
<b>2023</b>	454	165	36	254	36.3%
<b>2023 Q2</b>	119	46	9	64	38.9%
<b>2023 Q3</b>	111	39	9	63	35.2%
<b>2023 Q4</b>	105	36	8	61	34.6%
<b>2024 Q1</b>	98	33	7	57	34.2%
<b>2024 Q2</b>	93	32	6	54	34.7%

Notes: Excludes VAT. <sup>1</sup>. 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	30,048	11,031	4,311	14,707	36.7%
2023	26,652	9,552	3,884	13,216	35.8%
2023 Q2	28,478	10,435	4,087	13,956	36.6%
2023 Q3	27,524	9,996	3,966	13,562	36.3%
2023 Q4	26,652	9,552	3,884	13,216	35.8%
2024 Q1	26,064	9,385	3,801	12,878	36.0%
2024 Q2	25,397	9,165	3,704	12,528	36.1%

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

	All Operators	BT	Virgin Media	Other	BT Share
2022	29,146	12,294	3,272	13,580	42.2%
2023	23,276	9,968	2,456	10,852	42.8%
2023 Q2	5,678	2,384	608	2,686	42.0%
2023 Q3	5,662	2,449	604	2,609	43.3%
2023 Q4	5,458	2,376	553	2,529	43.5%
2024 Q1	5,037	2,191	525	2,321	43.5%
2024 Q2	4,460	1,885	466	2,109	42.3%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls <sup>1</sup>
2022	541	184	52	166	142
2023	453	144	52	134	126
2023 Q2	119	38	13	35	34
2023 Q3	110	35	13	33	31
2023 Q4	105	33	13	31	28
2024 Q1	98	31	13	29	26
2024 Q2	93	26	12	28	27

Excludes VAT. <sup>1</sup>. 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
<b>UK geographic calls</b>					
2022	19,019	8,429	2,244	8,346	44.3%
2023	14,839	6,645	1,658	6,536	44.8%
2023 Q2	3,622	1,577	412	1,633	43.5%
2023 Q3	3,586	1,619	401	1,566	45.1%
2023 Q4	3,460	1,588	374	1,498	45.9%
2024 Q1	3,150	1,453	354	1,343	46.1%
2024 Q2	2,780	1,248	316	1,216	44.9%
<b>International calls</b>					
2022	936	179	54	703	19.1%
2023	781	134	38	609	17.1%
2023 Q2	194	32	10	152	16.5%
2023 Q3	189	32	8	149	17.0%
2023 Q4	187	31	9	147	16.6%
2024 Q1	181	28	8	145	15.5%
2024 Q2	162	24	7	131	14.8%
<b>Calls to mobiles</b>					
2022	5,545	2,029	527	2,989	36.6%
2023	4,820	1,773	436	2,611	36.8%
2023 Q2	1,167	422	106	639	36.1%
2023 Q3	1,192	441	114	637	37.0%
2023 Q4	1,183	439	101	643	37.1%
2024 Q1	1,120	415	94	611	37.0%
2024 Q2	998	347	84	567	34.8%
<b>Other calls<sup>1</sup></b>					
2022	3,646	1,657	447	1,542	45.5%
2023	2,836	1,416	324	1,096	49.9%
2023 Q2	694	353	80	261	50.8%
2023 Q3	696	357	81	258	51.3%
2023 Q4	628	318	69	241	50.7%
2024 Q1	586	295	69	222	50.4%
2024 Q2	519	266	59	194	51.2%

<sup>1</sup>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
<b>Access &amp; calls<sup>1</sup></b>					
<b>2022</b>	4,516	2,216	883	1,416	49.1%
<b>2023</b>	4,160	2,104	817	1,238	50.6%
<b>2023 Q2</b>	1,038	522	207	309	50.3%
<b>2023 Q3</b>	1,025	514	202	309	50.1%
<b>2023 Q4</b>	1,043	544	196	303	52.1%
<b>2024 Q1</b>	979	520	190	269	53.1%
<b>2024 Q2</b>	934	491	185	258	52.5%
<b>Access<sup>1</sup></b>					
<b>2022</b>	4,205	2,087	843	1,275	49.6%
<b>2023</b>	3,904	1,994	788	1,121	51.1%
<b>2023 Q2</b>	967	489	199	279	50.6%
<b>2023 Q3</b>	965	489	195	281	50.7%
<b>2023 Q4</b>	985	520	190	276	52.8%
<b>2024 Q1</b>	927	498	184	244	53.8%
<b>2024 Q2</b>	886	471	180	234	53.2%
<b>Calls</b>					
<b>2022</b>	310	129	40	141	41.4%
<b>2023</b>	256	110	29	117	42.9%
<b>2023 Q2</b>	71	33	8	30	47.2%
<b>2023 Q3</b>	60	25	7	28	41.0%
<b>2023 Q4</b>	58	24	6	27	41.6%
<b>2024 Q1</b>	53	22	6	25	41.4%
<b>2024 Q2</b>	48	19	5	24	39.4%

*Excludes VAT. <sup>1</sup>. 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	23,914	7,924	4,156	11,834	33.1%
2023	20,873	6,525	3,803	10,545	31.3%
2023 Q2	22,532	7,342	3,980	11,210	32.6%
2023 Q3	21,687	6,959	3,875	10,852	32.1%
2023 Q4	20,873	6,525	3,803	10,545	31.3%
2024 Q1	20,415	6,432	3,727	10,256	31.5%
2024 Q2	19,890	6,265	3,641	9,984	31.5%

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

	All Operators	BT	Virgin Media	Other	BT Share
2022	18,866	8,545	2,737	7,584	45.3%
2023	14,467	6,724	2,035	5,708	46.5%
2023 Q2	3,547	1,591	507	1,449	44.9%
2023 Q3	3,473	1,637	487	1,349	47.1%
2023 Q4	3,358	1,620	462	1,276	48.2%
2024 Q1	3,144	1,529	439	1,176	48.6%
2024 Q2	2,791	1,353	391	1,047	48.5%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls <sup>1</sup>
2022	310	132	32	63	83
2023	256	106	28	52	71
2023 Q2	71	29	8	14	19
2023 Q3	60	25	6	12	16
2023 Q4	58	24	6	12	16
2024 Q1	53	22	6	10	14
2024 Q2	48	18	6	11	14

Excludes VAT. <sup>1</sup>. 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
<b>UK geographic calls</b>					
2022	13,772	6,328	2,036	5,408	45.9%
2023	10,241	4,767	1,494	3,980	46.5%
2023 Q2	2,499	1,122	372	1,005	44.9%
2023 Q3	2,438	1,150	356	932	47.2%
2023 Q4	2,364	1,140	339	885	48.2%
2024 Q1	2,193	1,066	320	807	48.6%
2024 Q2	1,918	926	285	707	48.3%
<b>International calls</b>					
2022	525	135	52	338	25.7%
2023	414	97	38	279	23.5%
2023 Q2	105	23	10	72	22.0%
2023 Q3	97	23	8	66	23.8%
2023 Q4	95	22	9	64	23.1%
2024 Q1	94	21	8	65	22.3%
2024 Q2	80	18	7	55	22.5%
<b>Calls to mobiles</b>					
2022	2,044	841	278	925	41.1%
2023	1,774	765	233	776	43.1%
2023 Q2	435	178	58	199	40.9%
2023 Q3	434	191	57	186	44.0%
2023 Q4	434	198	56	180	45.6%
2024 Q1	405	189	53	163	46.6%
2024 Q2	379	175	49	155	46.2%
<b>Other calls<sup>1</sup></b>					
2022	2,525	1,241	371	913	49.2%
2023	2,038	1,095	270	673	53.7%
2023 Q2	508	268	67	173	52.7%
2023 Q3	504	273	66	165	54.2%
2023 Q4	465	260	58	147	55.9%
2024 Q1	452	253	58	141	55.9%
2024 Q2	414	234	50	130	56.5%

<sup>1</sup>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
<b>Access &amp; calls<sup>1</sup></b>					
2022	1,171	565	29	578	48.2%
2023	1,074	511	23	540	47.6%
2023 Q2	275	131	6	138	47.6%
2023 Q3	270	126	6	138	46.8%
2023 Q4	254	124	5	125	48.6%
2024 Q1	255	111	5	139	43.7%
2024 Q2	256	115	4	138	44.7%
<b>Access<sup>1</sup></b>					
2022	940	483	20	437	51.4%
2023	877	458	16	403	52.2%
2023 Q2	227	118	4	104	52.1%
2023 Q3	219	112	4	103	51.2%
2023 Q4	208	112	4	92	53.9%
2024 Q1	210	100	4	106	47.7%
2024 Q2	212	102	3	107	47.9%
<b>Calls</b>					
2022	231	81	9	140	35.1%
2023	197	53	7	137	27.0%
2023 Q2	48	13	2	34	26.0%
2023 Q3	50	14	2	34	27.6%
2023 Q4	47	12	1	34	25.3%
2024 Q1	45	11	1	32	25.1%
2024 Q2	44	13	1	30	29.1%

*Excludes VAT. <sup>1</sup>. 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	6,134	3,107	154	2,873	50.6%
2023	5,779	3,027	81	2,671	52.4%
2023 Q2	5,945	3,093	107	2,745	52.0%
2023 Q3	5,837	3,037	90	2,710	52.0%
2023 Q4	5,779	3,027	81	2,671	52.4%
2024 Q1	5,649	2,953	74	2,622	52.3%
2024 Q2	5,508	2,901	63	2,544	52.7%

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

	All Operators	BT	Virgin Media	Other	BT Share
2022	10,276	3,745	535	5,996	36.4%
2023	8,806	3,241	421	5,144	36.8%
2023 Q2	2,131	793	101	1,237	37.2%
2023 Q3	2,188	811	117	1,260	37.1%
2023 Q4	2,099	755	91	1,253	36.0%
2024 Q1	1,892	661	86	1,145	34.9%
2024 Q2	1,668	531	75	1,062	31.8%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls <sup>1</sup>
2022	231	52	20	103	55
2023	197	38	24	82	54
2023 Q2	48	9	5	20	14
2023 Q3	50	10	6	21	14
2023 Q4	47	9	7	19	12
2024 Q1	45	8	7	19	12
2024 Q2	44	8	7	18	13

Excludes VAT. <sup>1</sup>. 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
<b>UK geographic calls</b>					
2022	5,247	2,101	208	2,938	40.0%
2023	4,598	1,878	164	2,556	40.8%
2023 Q2	1,123	455	40	628	40.5%
2023 Q3	1,148	469	45	634	40.9%
2023 Q4	1,096	448	35	613	40.9%
2024 Q1	958	387	34	537	40.4%
2024 Q2	862	322	31	509	37.4%
<b>International calls</b>					
2022	411	44	2	365	10.7%
2023	368	37	0	331	10.1%
2023 Q2	90	9	0	81	10.0%
2023 Q3	92	9	0	83	9.8%
2023 Q4	92	9	0	83	9.8%
2024 Q1	87	7	0	80	8.1%
2024 Q2	82	6	0	76	7.3%
<b>Calls to mobiles</b>					
2022	3,501	1,188	249	2,064	33.9%
2023	3,046	1,008	203	1,835	33.1%
2023 Q2	732	244	48	440	33.3%
2023 Q3	757	250	57	450	33.0%
2023 Q4	749	241	45	463	32.2%
2024 Q1	715	226	41	448	31.6%
2024 Q2	619	172	35	412	27.8%
<b>Other calls<sup>1</sup></b>					
2022	1,117	412	76	629	36.9%
2023	794	318	54	422	40.0%
2023 Q2	186	85	13	88	45.7%
2023 Q3	191	83	15	93	43.4%
2023 Q4	162	57	11	94	35.2%
2024 Q1	132	41	11	80	31.0%
2024 Q2	104	31	9	64	29.7%

<sup>1</sup>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
<b>2022</b>	28,149	2,833	5,440	19,876	32.9%
<b>2023</b>	28,460	2,298	5,533	20,629	32.0%
<b>2023 Q2</b>	28,341	2,538	5,419	20,384	32.5%
<b>2023 Q3</b>	28,378	2,419	5,447	20,512	32.2%
<b>2023 Q4</b>	28,460	2,298	5,533	20,629	32.0%
<b>2024 Q1</b>	28,460	2,201	5,368	20,890	31.7%
<b>2024 Q2</b>	28,994	2,082	5,327	21,585	30.7%

*Note: Total and 'other inc. FTTx' fixed broadband lines figures for Q2 2024 are not comparable to those for previous quarters due to around 20 additional broadband providers starting to submit data.*

## 3. Mobile Telecoms market data tables

### Q2 2024 (April to June)

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*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
<b>2022</b>	12,977	10,653	55	60	70	131	146	440	1,422
<b>2023</b>	13,675	11,322	43	56	65	117	169	424	1,480
<b>2023 Q2</b>	3,482	2,892	11	14	16	30	42	105	372
<b>2023 Q3</b>	3,525	2,909	10	14	16	29	51	106	389
<b>2023 Q4</b>	3,488	2,892	9	14	16	28	42	114	373
<b>2024 Q1</b>	3,407	2,859	8	14	14	26	39	102	345
<b>2024 Q2</b>	3,579	3,007	8	13	14	27	43	107	359

*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
<b>2022</b>	171.08	35.25	50.23	76.35	1.77	1.81	5.67	36.63	7,576
<b>2023</b>	164.77	29.63	48.70	77.96	1.85	1.72	4.91	31.68	9,405
<b>2023 Q2</b>	40.51	7.18	11.91	19.21	0.49	0.45	1.28	7.94	2,294
<b>2023 Q3</b>	40.34	7.30	11.94	18.93	0.44	0.55	1.17	7.79	2,437
<b>2023 Q4</b>	41.82	7.39	12.59	19.97	0.42	0.36	1.10	7.82	2,474
<b>2024 Q1</b>	41.19	7.31	12.42	19.67	0.38	0.30	1.10	7.31	2,497
<b>2024 Q2</b>	39.50	6.86	11.96	18.94	0.36	0.34	1.04	7.04	2,609

*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
<b>2022</b>	86.66	64.26	22.40	1.89	74.15%	4.96
<b>2023</b>	89.16	66.16	23.00	2.49	74.21%	4.82
<b>2023 Q2</b>	87.45	64.60	22.86	0.63	73.87%	4.92
<b>2023 Q3</b>	88.97	65.32	23.65	1.52	73.42%	4.80
<b>2023 Q4</b>	89.16	66.16	23.00	0.18	74.21%	4.82
<b>2024 Q1</b>	89.02	66.34	22.68	-0.14	74.52%	4.70
<b>2024 Q2</b>	89.57	66.46	23.11	0.55	74.2%	4.61

*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
<b>2022</b>	12.52	15.01	5.21
<b>2023</b>	12.98	15.73	5.18
<b>2023 Q2</b>	13.32	16.18	5.16
<b>2023 Q3</b>	13.32	16.23	5.19
<b>2023 Q4</b>	13.05	15.79	5.33
<b>2024 Q1</b>	12.75	15.29	5.36
<b>2024 Q2</b>	13.36	16.08	5.47

**Table 5: Interconnection call volumes (billions of minutes)**

	All operators
2022	61.24
2023	62.54
2023 Q2	15.54
2023 Q3	15.17
2023 Q4	15.52
2024 Q1	15.78
2024 Q2	15.39

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