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Telecommunications Market Data Update

Q2 2022

MARKET DATA

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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 totaled £1.44bn in Q2 2022; a decrease of £11m (0.8%) from the previous quarter and £106m (6.9%) year-on-year. BT’s share of these revenues was 48.9%.
- The number of fixed exchange lines (including PSTN, ISDN and managed VoIP connections) fell by 412k (1.3%) during the quarter to 31.0 million.
- Total fixed-originated call volumes decreased by 833 million minutes (9.5%) during the quarter, to 7.9 billion minutes.

Fixed broadband services

- There were 27.8 million fixed broadband lines at the end of Q2 2022, an increase 228k (0.8%) year-on-year.
- There were 19.3 million ‘other inc. FTTx’ broadband connections (predominantly fibre-to-the-cabinet and full fibre connections) at the end of Q2 2022, accounting for 69.2% of all lines.
- The number of ADSL lines fell by 204k (6.1%) during the quarter, while the number of cable lines increased by 16k (0.6%) and the number of ‘other inc. FTTx’ lines increased by 180k (0.9%).
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Mobile services

- Mobile telephony services generated £3.25bn in retail revenues in Q2 2022, a £191m (6.3%) increase from a year previously.
- Average monthly retail revenue per subscriber was £12.65 in Q2 2022, with post-pay subscribers generating more revenue than pre-pay users (averaging £15.23 compared to £5.26 for pre-pay).
- The number of active mobile subscriptions (excluding M2M) was 86.1 million at the end of Q2 2022, up 2.2 million (2.6%) from the year before.
- Over the same period, the number of dedicated mobile broadband subscriptions increased by 0.1 million (2.1%) to 5.2 million.
- The number of mobile messages (including SMS and MMS) saw a year-on-year decline, down 1.0 billion messages (10.3%) to 9.1 billion.
- The number of mobile-originated voice call minutes decreased by 4.0 billion (8.6%) to 42.3 billion minutes year-on-year, with calls to landlines decreasing by 11.7% to 8.7 billion minutes.

2. Fixed telecoms market data tables

Q2 2022 (April to June)

Table

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[2]	Virgin Media	Other	BT share[2]
Access & calls[1]					
2020	7,049	3,411	1,060	2,578	48.4%
2021	6,157	3,051	980	2,127	49.6%
2021 Q2	1,542	773	244	525	50.1%
2021 Q3	1,513	745	242	526	49.2%
2021 Q4	1,487	727	241	518	48.9%
2022 Q1	1,447	708	237	502	48.9%
2022 Q2	1,436	702	229	506	48.9%
Access[1]					
2020	6,137	2,998	960	2,178	48.9%
2021	5,471	2,765	910	1,796	50.5%
2021 Q2	1,371	702	227	442	51.2%
2021 Q3	1,346	674	226	446	50.1%
2021 Q4	1,329	661	226	442	49.7%
2022 Q1	1,300	649	222	429	49.9%
2022 Q2	1,300	648	216	436	49.8%
Calls					
2020	912	412	100	400	45.2%
2021	687	286	70	331	41.7%
2021 Q2	171	71	17	83	41.2%
2021 Q3	167	70	16	80	42.1%
2021 Q4	158	66	15	77	42.0%
2022 Q1	147	59	15	73	40.3%
2022 Q2	136	54	12	70	39.9%

Notes: Excludes VAT. [1] Revenue figures are not intended to include subscription revenues for internet access although some element may remain. [2] The step change in BT's calls and access revenues in 2019 Q4 is due to a reallocation of revenues; [2] includes EE from 2017 Q4.

Table 2: Summary of exchange line numbers at end of quarter (000's)

	All Operators	BT[2]	Virgin Media	Other	BT share[2]
2020	32,730	13,012	4,624	15,094	39.8%
2021	31,703	12,231	4,555	14,917	38.6%
2021 Q2	32,209	12,736	4,539	14,935	39.5%
2021 Q3	32,067	12,505	4,557	15,005	39.0%
2021 Q4	31,703	12,231	4,555	14,917	38.6%
2022 Q1	31,413	11,940	4,467	15,006	38.0%
2022 Q2	31,000	11,698	4,380	14,922	37.7%

Note: BT's line numbers have been restated to correct the double-counting of some fixed voice connections.. The increase in exchange lines in 2019 Q4 is due to managed VoIP connections being better-captured in the data.

Table 3: Summary of call volumes (millions of minutes)[1]

	All Operators	BT[2]	Virgin Media	Other	BT share[2]
2020	46,725	19,105	5,768	21,852	40.9%
2021	40,340	15,782	4,526	20,032	39.1%
2021 Q2	10,234	3,884	1,114	5,236	38.0%
2021 Q3	9,379	3,679	1,026	4,674	39.2%
2021 Q4	9,076	3,562	995	4,519	39.2%
2022 Q1	8,775	3,401	948	4,426	38.8%
2022 Q2	7,942	3,039	817	4,086	38.3%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2020	912	349	87	323	152
2021	687	254	59	224	150
2021 Q2	171	63	15	58	36
2021 Q3	167	60	14	54	38
2021 Q4	158	57	14	50	37
2022 Q1	147	52	14	47	34
2022 Q2	136	48	13	42	34

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[2]	Virgin Media	Other	BT share[2]
UK geographic calls					
2020	31,421	14,051	4,129	13,241	44.7%
2021	25,509	11,224	3,223	11,062	44.0%
2021 Q2	6,427	2,755	791	2,881	42.9%
2021 Q3	5,782	2,562	721	2,499	44.3%
2021 Q4	5,664	2,509	708	2,447	44.3%
2022 Q1	5,314	2,348	650	2,316	44.2%
2022 Q2	4,761	2,085	561	2,115	43.8%
International calls					
2020	1,679	333	108	1,238	19.8%
2021	1,204	251	71	882	20.8%
2021 Q2	319	65	18	236	20.4%
2021 Q3	265	56	16	193	21.1%
2021 Q4	273	56	15	202	20.5%
2022 Q1	259	51	16	192	19.7%
2022 Q2	241	45	15	181	18.7%
Calls to mobiles					
2020	7,199	2,559	831	3,809	35.5%
2021	6,954	2,460	723	3,771	35.4%
2021 Q2	1,806	613	182	1,011	34.0%
2021 Q3	1,657	592	168	897	35.7%
2021 Q4	1,579	565	159	855	35.8%
2022 Q1	1,543	563	154	826	36.5%
2022 Q2	1,374	500	130	744	36.4%
Other calls[1]					
2020	6,426	2,162	700	3,564	33.6%
2021	6,673	1,847	509	4,317	27.7%
2021 Q2	1,682	451	123	1,108	26.8%
2021 Q3	1,675	469	121	1,085	28.0%
2021 Q4	1,559	432	113	1,014	27.7%
2022 Q1	1,659	439	128	1,092	26.5%
2022 Q2	1,566	409	111	1,046	26.1%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types.
[2] Includes EE from 2017 Q4.

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

	All Operators	BT[2]	Virgin Media	Other	BT share[2]
Access & calls[1]					
2020	5,414	2,552	1,016	1,846	47.1%
2021	4,837	2,381	942	1,513	49.2%
2021 Q2	1,211	603	234	374	49.8%
2021 Q3	1,193	585	233	376	49.0%
2021 Q4	1,182	576	233	374	48.7%
2022 Q1	1,150	562	229	360	48.8%
2022 Q2	1,140	559	221	361	49.0%
Access[2]					
2020	4,856	2,281	936	1,639	47.0%
2021	4,432	2,206	887	1,338	49.8%
2021 Q2	1,112	560	221	331	50.3%
2021 Q3	1,098	544	220	334	49.6%
2021 Q4	1,090	537	220	332	49.3%
2022 Q1	1,067	528	216	323	49.5%
2022 Q2	1,062	526	211	325	49.5%
Calls					
2020	558	272	80	207	48.7%
2021	405	175	55	175	43.2%
2021 Q2	99	43	14	42	43.7%
2021 Q3	96	41	13	42	42.4%
2021 Q4	93	39	12	41	42.2%
2022 Q1	84	34	12	38	40.6%
2022 Q2	78	33	10	35	42.0%

Excludes VAT. [1] Revenue figures are not intended to include subscription revenues for internet access although some element may remain. [2] The step change in BT's calls and access revenues in 2019 Q4 is due to a reallocation of revenues. [2] Includes EE from 2017 Q4.

Table 7: Summary of residential exchange line numbers at end of quarter (000's)

	All Operators	BT[2]	Virgin Media	Other	BT share[2]
2020	26,424	9,477	4,425	12,521	35.9%
2021	25,883	8,984	4,379	12,520	34.7%
2021 Q2	26,190	9,350	4,350	12,491	35.7%
2021 Q3	26,126	9,192	4,375	12,559	35.2%
2021 Q4	25,883	8,984	4,379	12,520	34.7%
2022 Q1	25,580	8,738	4,296	12,546	34.2%
2022 Q2	25,152	8,494	4,216	12,442	33.8%

Note: BT's line numbers have been restated to correct the double-counting of some fixed voice connections.

Table 8: Summary of residential call volumes (millions of minutes)[1]

	All Operators	BT[2]	Virgin Media	Other	BT share[2]
2020	31,534	14,251	4,897	12,386	45.2%
2021	25,883	11,373	3,794	10,716	43.9%
2021 Q2	6,511	2,771	925	2,815	42.6%
2021 Q3	5,799	2,585	855	2,359	44.6%
2021 Q4	5,713	2,544	836	2,333	44.5%
2022 Q1	5,305	2,374	783	2,148	44.8%
2022 Q2	4,692	2,111	683	1,898	45.0%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2020	558	266	48	155	89
2021	405	184	38	85	98
2021 Q2	99	45	9	21	24
2021 Q3	96	42	9	20	24
2021 Q4	93	41	9	19	24
2022 Q1	84	37	8	17	21
2022 Q2	78	34	8	16	21

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; [2] Includes EE from 2017 Q4.

Table 10: Summary of residential call volumes by call type (millions of minutes)

	All Operators	BT[2]	Virgin Media	Other	BT share[2]
UK geographic calls					
2020	24,174	11,345	3,766	9,063	46.9%
2021	19,557	8,812	2,923	7,822	45.1%
2021 Q2	4,906	2,147	714	2,045	43.8%
2021 Q3	4,314	1,960	650	1,704	45.4%
2021 Q4	4,283	1,945	639	1,699	45.4%
2022 Q1	3,927	1,790	587	1,550	45.6%
2022 Q2	3,429	1,565	508	1,356	45.6%
International calls					
2020	941	256	103	582	27.2%
2021	748	195	71	482	26.1%
2021 Q2	199	50	18	131	25.2%
2021 Q3	167	43	16	108	25.7%
2021 Q4	163	43	15	105	26.4%
2022 Q1	149	39	15	95	26.1%
2022 Q2	135	34	14	87	25.2%
Calls to mobiles					
2020	2,759	1,017	435	1,307	36.9%
2021	2,538	986	358	1,194	38.8%
2021 Q2	631	238	87	306	37.7%
2021 Q3	590	233	83	274	39.5%
2021 Q4	589	235	82	272	39.9%
2022 Q1	551	222	77	252	40.3%
2022 Q2	502	206	68	228	41.0%
Other calls[1]					
2020	3,658	1,633	593	1,432	44.6%
2021	3,043	1,380	442	1,221	45.4%
2021 Q2	776	336	106	334	43.3%
2021 Q3	728	349	106	273	47.9%
2021 Q4	679	321	100	258	47.3%
2022 Q1	678	323	104	251	47.6%
2022 Q2	626	306	93	227	48.9%

[1] Includes freephone, special services, premium rate, directory enquiries and all other call types.
[2] Includes EE from 2017 Q4.

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

	All Operators	BT[2]	Virgin Media	Other	BT share[2]
Access & Calls[1]					
2020	1,631	855	44	732	52.4%
2021	1,319	668	38	613	50.6%
2021 Q2	331	169	10	152	51.2%
2021 Q3	318	159	9	150	50.0%
2021 Q4	304	151	8	145	49.6%
2022 Q1	296	146	8	142	49.3%
2022 Q2	295	142	7	145	48.3%
Access[1]					
2020	1,281	718	24	539	56.1%
2021	1,039	559	22	457	53.8%
2021 Q2	259	142	6	111	54.9%
2021 Q3	248	130	5	112	52.5%
2021 Q4	239	124	5	110	51.8%
2022 Q1	233	121	5	107	52.0%
2022 Q2	238	122	5	111	51.3%
Calls					
2020	350	137	20	193	39.2%
2021	280	109	15	156	39.0%
2021 Q2	72	27	4	41	37.7%
2021 Q3	70	29	3	38	41.3%
2021 Q4	65	27	3	35	41.2%
2022 Q1	63	25	3	35	39.3%
2022 Q2	57	20	2	34	35.9%

Excludes VAT. [1] Revenue figures are not intended to include subscription revenues for internet access although some element may remain. [2] The step change in BT's calls and access revenues in 2019 Q4 is due to a reallocation of revenues. [2] Includes EE from 2017 Q4.

Table 12: Summary of business exchange line numbers at end of quarter (000's)

	All Operators	BT[2]	Virgin Media	Other	BT share[2]
2020	6,307	3,535	199	2,573	56.1%
2021	5,820	3,247	176	2,397	55.8%
2021 Q2	6,019	3,386	189	2,444	56.3%
2021 Q3	5,941	3,313	182	2,446	55.8%
2021 Q4	5,820	3,247	176	2,397	55.8%
2022 Q1	5,833	3,202	171	2,460	54.9%
2022 Q2	5,849	3,205	164	2,480	54.8%

Note: the increase in exchange lines in 2019 Q4 is due to managed VoIP connections being better-captured in the data.

Table 13: Summary of business call volumes (millions of minutes)[1]

	All Operators	BT[2]	Virgin Media	Other	BT share[2]
2020	15,183	4,846	871	9,466	31.9%
2021	14,453	4,405	732	9,316	30.5%
2021 Q2	3,721	1,112	189	2,420	29.9%
2021 Q3	3,580	1,094	171	2,315	30.6%
2021 Q4	3,362	1,017	159	2,186	30.2%
2022 Q1	3,470	1,026	165	2,279	29.6%
2022 Q2	3,249	927	134	2,188	28.5%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2020	350	83	39	168	60
2021	280	69	21	140	51
2021 Q2	72	18	5	37	12
2021 Q3	70	18	5	34	14
2021 Q4	65	16	5	31	13
2022 Q1	63	16	5	30	12
2022 Q2	57	15	5	26	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. [2] Includes EE from 2017 Q4.

Table 15: Summary of business call volumes by call type (millions of minutes)

	All Operators	BT[2]	Virgin Media	Other	BT share[2]
UK geographic calls					
2020	7,246	2,706	363	4,177	37.3%
2021	5,955	2,412	300	3,243	40.5%
2021 Q2	1,521	608	77	836	40.0%
2021 Q3	1,469	602	71	796	41.0%
2021 Q4	1,382	564	69	749	40.8%
2022 Q1	1,389	558	63	768	40.2%
2022 Q2	1,332	520	53	759	39.0%
International calls					
2020	738	77	5	656	10.4%
2021	456	56	0	400	12.3%
2021 Q2	120	15	0	105	12.5%
2021 Q3	98	13	0	85	13.3%
2021 Q4	111	13	0	98	11.8%
2022 Q1	109	12	1	96	11.0%
2022 Q2	107	11	1	95	10.3%
Calls to mobiles					
2020	4,440	1,542	396	2,502	34.7%
2021	4,416	1,474	365	2,577	33.4%
2021 Q2	1,175	375	95	705	31.9%
2021 Q3	1,067	359	85	623	33.7%
2021 Q4	990	330	77	583	33.3%
2022 Q1	992	341	77	574	34.4%
2022 Q2	871	294	62	515	33.7%
Other calls[1]					
2020	2,759	521	107	2,131	18.9%
2021	3,626	463	67	3,096	12.8%
2021 Q2	905	114	17	774	12.6%
2021 Q3	947	120	15	812	12.7%
2021 Q4	880	110	13	757	12.5%
2022 Q1	979	115	24	840	11.7%
2022 Q2	938	102	18	818	10.9%

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

[2] Includes EE from 2017 Q4.

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[1]
2020	27,402	5,252	5,268	16,883	33.6%
2021	27,764	3,739	5,355	18,670	33.6%
2021 Q2	27,601	4,374	5,335	17,891	33.6%
2021 Q3	27,698	4,006	5,381	18,311	33.6%
2021 Q4	27,764	3,739	5,355	18,670	33.6%
2022 Q1	27,837	3,362	5,383	19,091	33.4%
2022 Q2	27,829	3,159	5,399	19,271	33.3%

[1] Includes EE from 2017 Q4.

3. Mobile telecoms market data tables

Q2 2022 (April to June)

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
2020	12,514	10,176	105	109	148	188	111	496	1,179
2021	12,283	10,142	67	65	90	140	95	440	1,244
2021 Q2	3,059	2,539	17	16	23	35	20	107	302
2021 Q3	3,087	2,542	17	16	22	34	25	107	323
2021 Q4	3,103	2,547	16	16	20	34	28	119	323
2022 Q1	3,037	2,502	14	15	18	33	29	109	316
2022 Q2	3,251	2,680	14	14	17	33	35	107	350

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 and message 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
2020	189.66	41.61	54.6	82.36	3.06	1.75	6.28	48.68	4,440.47
2021	186.5	39.91	54.19	82.59	2.27	1.52	6.03	40.86	5,717.63
2021 Q2	46.23	9.82	13.49	20.53	0.59	0.30	1.50	10.17	1402.18
2021 Q3	45.35	9.70	13.18	19.93	0.54	0.51	1.50	10.57	1487.40
2021 Q4	46.45	9.85	13.63	20.53	0.52	0.39	1.53	10.48	1547.27
2022 Q1	44.72	9.42	13.13	19.88	0.52	0.46	1.30	9.52	1592.08
2022 Q2	42.25	8.67	12.45	18.80	0.45	0.46	1.41	9.12	1739.73

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
2020	83.8	61.59	22.21	-1.4	73.00%	4.79
2021	85.01	63.54	21.47	1.21	75.00%	5.24
2021 Q2	83.89	62.12	21.77	0.59	74.00%	5.12
2021 Q3	84.47	62.78	21.69	0.59	74.30%	5.19
2021 Q4	85.01	63.54	21.47	0.54	74.70%	5.24
2022 Q1	85.25	63.96	21.29	0.24	75.00%	5.04
2022 Q2	86.09	64.28	21.81	0.84	74.70%	5.23

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
2020	12.42	15.48	4.67
2021	12.17	14.74	5.1
2021 Q2	12.20	14.71	5.14
2021 Q3	12.22	14.77	5.26
2021 Q4	12.21	14.75	5.22
2022 Q1	11.89	14.36	4.87
2022 Q2	12.65	15.23	5.26

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

Table 5: Interconnection call volumes (billions of minutes)

	All operators
2020	65.8
2021	62.33
2021 Q2	16.1
2021 Q3	14.36
2021 Q4	14.24
2022 Q1	14.93
2022 Q2	14.91

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