Telecommunications Market Data Update

Q3 2024

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 retail fixed voice revenues totalled £1.19bn in Q3 2024; a fall of £19.9m (1.6%) compared to the previous quarter and a decrease of £101.0m (7.8%) year-on-year. BT's share of these revenues was 50.6%.
- The total number of fixed lines (including PSTN lines, ISDN channels and managed VoIP connections) declined by 986k (3.8%) during the quarter to 25.0 million.
- Total fixed-originated call volumes fell by 1.41 billion minutes (24.9%) year on year, to 4.25 billion minutes.

Fixed broadband services

- There were 29.1 million fixed broadband lines at the end of Q3 2024, an increase of 682k (2.4%) year on year.
- There were 21.8 million 'other inc. FTTx' broadband connections (predominantly fibre-to-the-cabinet and full fibre connections) at the end of Q3 2024, accounting for three-quarters (75%) of all lines.
- The number of ADSL lines declined by 128k (6.1%) during the quarter, while the number of cable lines fell by 22k (0.4%) and the number of 'other inc. FTTx' lines grew by 235k (1.1%).

Mobile services

- Mobile telephony services generated £3.59bn in retail revenues in Q3 2024, a £63.3m (1.8%) increase from a year previously.
- Average monthly retail revenue per subscriber was £13.37 in Q3 2024, with post-pay subscribers generating more revenue than pre-pay users (averaging £16.17 compared to £5.35 for pre-pay).
- The number of active mobile subscriptions (excluding M2M) was 89.5 million at the end of Q3 2024, up 558k (0.6%) from the year before.
- Over the same period, the number of dedicated mobile broadband subscriptions declined by 31k (0.6%) to 4.8 million.
- The number of mobile-originated voice call minutes declined by 1.97 billion (4.9%) to 38.36 billion minutes year-on-year, with calls to landlines decreasing by 8.9% to 6.65 billion minutes.
- The number of mobile messages (including SMS and MMS) saw a year-on-year decline, down 0.86 billion messages (11.0%) to 6.93 billion.
- Data usage grew, with volumes up 187 PB (7.7%) year-on-year to 2,624 PB.

2. Fixed Telecoms market data tables

Q3 2024 (July to September)

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	5,693	2,784	913	1,997	48.9%
2023	5,248	2,617	840	1,790	49.9%
2023 Q3	1,295	640	208	447	49.4%
2023 Q4	1,308	668	201	439	51.1%
2024 Q1	1,253	632	195	426	50.4%
2024 Q2	1,214	605	189	420	49.9%
2024 Q3	1,194	605	184	405	50.6%
Access[1]					
2022	5,146	2,571	863	1,712	50.0%
2023	4,790	2,453	804	1,534	51.2%
2023 Q3	1,184	601	199	384	50.8%
2023 Q4	1,202	632	194	377	52.5%
2024 Q1	1,154	599	188	367	51.9%
2024 Q2	1,120	573	183	363	51.2%
2024 Q3	1,106	577	179	351	52.1%
Calls					
2022	547	213	50	285	38.9%
2023	457	165	36	256	36.1%
2023 Q3	111	39	9	63	35.0%
2023 Q4	106	36	8	62	34.2%
2024 Q1	99	33	7	59	33.7%
2024 Q2	94	32	6	56	34.1%
2024 Q3	88	28	6	54	32.1%

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	30,048	11,031	4,311	14,707	36.7%
2023	26,876	9,552	3,884	13,440	35.5%
2023 Q3	27,524	9,996	3,966	13,562	36.3%
2023 Q4	26,876	9,552	3,884	13,440	35.5%
2024 Q1	26,492	9,385	3,801	13,306	35.4%
2024 Q2	25,957	9,165	3,704	13,088	35.3%
2024 Q3	24,971	8,484	3,612	12,875	34.0%

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	23,312	9,968	2,456	10,888	42.8%
2023 Q3	5,662	2,449	604	2,609	43.3%
2023 Q4	5,494	2,376	553	2,565	43.2%
2024 Q1	5,103	2,191	525	2,387	42.9%
2024 Q2	4,538	1,885	466	2,187	41.5%
2024 Q3	4,250	1,755	436	2,059	41.3%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2022	544	185	52	167	155
2023	455	145	53	135	127
2023 Q3	111	35	13	33	31
2023 Q4	106	33	14	31	28
2024 Q1	99	31	13	29	26
2024 Q2	94	26	12	29	28
2024 Q3	88	24	13	28	23

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	19,019	8,429	2,244	8,346	44.3%
2023	14,864	6,645	1,658	6,561	44.7%
2023 Q3	3,586	1,619	401	1,566	45.1%
2023 Q4	3,486	1,588	374	1,524	45.6%
2024 Q1	3,197	1,453	354	1,390	45.4%
2024 Q2	2,835	1,248	316	1,271	44.0%
2024 Q3	2,640	1,163	294	1,183	44.1%
International calls					
2022	936	179	54	703	19.1%
2023	782	134	38	610	17.1%
2023 Q3	189	32	8	149	17.0%
2023 Q4	188	31	9	148	16.5%
2024 Q1	182	28	8	146	15.4%
2024 Q2	164	24	7	133	14.7%
2024 Q3	160	22	7	131	13.7%
Calls to mobiles					
2022	5,545	2,029	527	2,989	36.6%
2023	4,825	1,773	436	2,616	36.7%
2023 Q3	1,192	441	114	637	37.0%
2023 Q4	1,188	439	101	648	37.0%
2024 Q1	1,129	415	94	620	36.8%
2024 Q2	1,008	347	84	577	34.4%
2024 Q3	957	320	80	557	33.4%
Other calls[1]					
2022	3,646	1,657	447	1,542	45.5%
2023	2,840	1,416	324	1,100	49.9%
2023 Q3	696	357	81	258	51.3%
2023 Q4	632	318	69	245	50.3%
2024 Q1	595	295	69	231	49.6%
2024 Q2	531	266	59	206	50.1%
2024 Q3	492	250	55	187	50.8%

[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	4,517	2,216	883	1,417	49.1%
2023	4,171	2,104	817	1,249	50.5%
2023 Q3	1,025	514	202	309	50.1%
2023 Q4	1,053	544	196	313	51.6%
2024 Q1	998	520	190	287	52.1%
2024 Q2	958	491	185	282	51.2%
2024 Q3	951	497	181	273	52.3%
Access[1]					
2022	4,205	2,087	843	1,275	49.6%
2023	3,913	1,994	788	1,131	51.0%
2023 Q3	965	489	195	281	50.7%
2023 Q4	995	520	190	285	52.3%
2024 Q1	944	498	184	261	52.8%
2024 Q2	908	471	180	257	51.9%
2024 Q3	906	481	176	249	53.1%
Calls					
2022	311	129	40	143	41.3%
2023	257	110	29	118	42.7%
2023 Q3	60	25	7	29	40.8%
2023 Q4	59	24	6	28	41.1%
2024 Q1	54	22	6	26	40.6%
2024 Q2	50	19	5	25	38.3%
2024 Q3	46	16	5	24	35.8%

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	23,914	7,924	4,156	11,834	33.1%
2023	21,097	6,525	3,803	10,769	30.9%
2023 Q3	21,687	6,959	3,875	10,852	32.1%
2023 Q4	21,097	6,525	3,803	10,769	30.9%
2024 Q1	20,843	6,432	3,727	10,684	30.9%
2024 Q2	20,457	6,265	3,641	10,552	30.6%
2024 Q3	19,596	5,636	3,560	10,400	28.8%

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	14,503	6,724	2,035	5,744	46.4%
2023 Q3	3,473	1,637	487	1,349	47.1%
2023 Q4	3,394	1,620	462	1,312	47.7%
2024 Q1	3,210	1,529	439	1,242	47.6%
2024 Q2	2,871	1,353	391	1,127	47.1%
2024 Q3	2,704	1,266	370	1,068	46.8%

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	311	132	32	63	84
2023	257	106	28	52	71
2023 Q3	60	25	6	12	17
2023 Q4	59	24	6	12	16
2024 Q1	54	23	6	11	15
2024 Q2	50	19	6	11	14
2024 Q3	46	16	6	10	14

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	13,772	6,328	2,036	5,408	45.9%
2023	10,267	4,767	1,494	4,006	46.4%
2023 Q3	2,438	1,150	356	932	47.2%
2023 Q4	2,390	1,140	339	911	47.7%
2024 Q1	2,239	1,066	320	853	47.6%
2024 Q2	1,974	926	285	763	46.9%
2024 Q3	1,839	855	267	717	46.5%
International calls					
2022	525	135	52	338	25.7%
2023	414	97	38	279	23.4%
2023 Q3	97	23	8	66	23.8%
2023 Q4	96	22	9	65	22.9%
2024 Q1	96	21	8	67	22.0%
2024 Q2	82	18	7	57	22.0%
2024 Q3	77	16	7	54	20.7%
Calls to mobiles					
2022	2,044	841	278	925	41.1%
2023	1,778	765	233	780	43.0%
2023 Q3	434	191	57	186	44.0%
2023 Q4	439	198	56	185	45.1%
2024 Q1	414	189	53	172	45.6%
2024 Q2	390	175	49	166	44.9%
2024 Q3	379	169	48	162	44.5%
Other calls[1]					
2022	2,525	1,241	371	913	49.2%
2023	2,043	1,095	270	678	53.6%
2023 Q3	504	273	66	165	54.2%
2023 Q4	470	260	58	152	55.4%
2024 Q1	461	253	58	150	54.8%
2024 Q2	425	234	50	141	55.0%
2024 Q3	408	226	48	134	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	1,173	565	29	579	48.1%
2023	1,075	511	23	541	47.6%
2023 Q3	270	126	6	138	46.8%
2023 Q4	255	124	5	126	48.6%
2024 Q1	255	111	5	139	43.7%
2024 Q2	256	115	4	138	44.7%
2024 Q3	243	107	4	132	44.1%
Access[1]					
2022	940	483	20	437	51.4%
2023	877	458	16	403	52.2%
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	48.0%
2024 Q3	201	95	3	102	47.5%
Calls					
2022	233	81	9	142	34.9%
2023	198	53	7	138	26.9%
2023 Q3	51	14	2	35	27.5%
2023 Q4	47	12	1	34	25.2%
2024 Q1	45	11	1	33	24.9%
2024 Q2	45	13	1	31	29.0%
2024 Q3	42	12	1	30	27.8%

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	6,134	3,107	154	2,873	50.6%
2023	5,779	3,027	81	2,671	52.4%
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	5,500	2,901	63	2,536	52.7%
2024 Q3	5,374	2,848	52	2,475	53.0%

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 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	1,666	531	75	1,060	31.9%
2024 Q3	1,545	488	66	991	31.6%

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	233	53	20	104	68
2023	198	39	24	82	54
2023 Q3	51	10	6	21	14
2023 Q4	47	9	7	19	12
2024 Q1	45	8	7	19	12
2024 Q2	45	8	7	18	13
2024 Q3	42	8	7	18	9

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	5,247	2,101	208	2,938	40.0%
2023	4,598	1,878	164	2,556	40.8%
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	861	322	31	508	37.4%
2024 Q3	801	308	27	466	38.5%
International calls					
2022	411	44	2	365	10.7%
2023	368	37	0	331	10.1%
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%
2024 Q3	83	6	0	77	7.2%
Calls to mobiles					
2022	3,501	1,188	249	2,064	33.9%
2023	3,046	1,008	203	1,835	33.1%
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%
2024 Q3	578	151	32	395	26.1%
Other calls[1]					
2022	1,117	412	76	629	36.9%
2023	794	318	54	422	40.0%
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%
2024 Q3	84	23	7	54	27.5%

[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)

	Total	ADSL	Cable	Other (inc. FTTx)	BT retail Share
2022	28,149	2,833	5,440	19,876	32.9%
2023	28,460	2,298	5,533	20,628	32.0%
2023 Q3	28,377	2,419	5,447	20,512	32.2%
2023 Q4	28,460	2,298	5,533	20,628	32.0%
2024 Q1	28,459	2,201	5,368	20,890	31.7%
2024 Q2	28,974	2,082	5,327	21,565	30.7%
2024 Q3	29,059	1,955	5,305	21,799	30.7%

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

Q3 2024 (July to September)

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
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
2024 Q1	3,407	2,859	8	14	14	26	39	102	345
2024 Q2	3,579	3,007	8	13	14	27	43	107	359
2024 Q3	3,589	2,985	8	13	14	27	50	113	379

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
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
2024 Q1	41.19	7.31	12.42	19.67	0.38	0.30	1.10	7.31	2,497
2024 Q2	39.50	6.86	11.96	18.94	0.36	0.34	1.04	7.04	2,609
2024 Q3	38.36	6.65	11.60	18.33	0.34	0.40	1.04	6.93	2,624

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
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
2024 Q1	89.02	66.34	22.68	-0.14	74.52%	4.70
2024 Q2	89.47	66.46	23.01	0.45	74.28%	4.61
2024 Q3	89.53	66.15	23.38	0.06	73.89%	4.77

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
2023 Q3	13.32	16.23	5.19
2023 Q4	13.05	15.79	5.33
2024 Q1	12.75	15.29	5.36
2024 Q2	13.37	16.08	5.48
2024 Q3	13.37	16.17	5.35

Table 5: Interconnection call volumes (billions of minutes)

	All operators
2022	61.24
2023	62.54
2023 Q3	15.17
2023 Q4	15.52
2024 Q1	15.78
2024 Q2	15.39
2024 Q3	14.92

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