Telecommunications Market Data Update

Q1 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 fixed voice service revenues totalled £1.22bn in Q1 2024; a decrease of £81.3m (6.3%) from the previous quarter and a decrease of £112.9m (8.5%) year-on-year. BT's share of these revenues was 51.9%.
- The total number of fixed lines (including PSTN lines, ISDN channels and managed VoIP connections) declined by 588k (2.2%) during the quarter to 26.1 million.
- Total fixed-originated call volumes fell by 1,431 million minutes (22.1%) year on year, to 5.05 billion minutes.

Fixed broadband services

- There were 28.5 million fixed broadband lines at the end of Q1 2024, an increase of 89k (0.3%) year-on-year but unchanged quarter-on-quarter.
- There were 20.9 million 'other inc. FTTx' broadband connections (predominantly fibre-to-the-cabinet and full fibre connections) at the end of Q1 2024, accounting for 73.4% of all lines.
- The number of ADSL lines fell by 97k (4.2%) during the quarter, while the number of cable lines decreased by 165k (3.0%) and the number of 'other inc. FTTx' lines increased by 262k (1.3%).

Mobile services

- Mobile telephony services generated £3.41bn in retail revenues in Q1 2024, a £227.7m (7.2%) increase from a year previously.
- Average monthly retail revenue per subscriber was £12.75 in Q1 2024, with post-pay subscribers generating more revenue than pre-pay users (averaging £15.29 compared to £5.36 for pre-pay).
- The number of active mobile subscriptions (excluding M2M) was 89.0 million at the end of Q1 2024, up 2.2 million (2.5%) from the year before.
- Over the same period, the number of dedicated mobile broadband subscriptions decreased by 185k (3.8%) to 4.7 million.
- The number of mobile-originated voice call minutes decreased by 914.4 million (2.2%) to 41.19 billion minutes year-on-year, with calls to landlines decreasing by 5.9% to 7.31 billion minutes.
- The number of mobile messages (including SMS and MMS) saw a year-on-year decline, down 0.83 billion messages (10.2%) to 7.31 billion.
- Data usage increased, with volumes up 297 PB (13.5%) year-on-year to 2497 PB.

2. Fixed Telecoms market data tables

Q1 2024 (January to March)

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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
Access & calls[1]					
2022	5,690	2,784	913	1,994	48.9%
2023	5,235	2,617	840	1,778	50.0%
2023 Q1	1,330	655	219	456	49.3%
2023 Q2	1,313	654	213	447	49.8%
2023 Q3	1,294	640	208	446	49.5%
2023 Q4	1,298	668	201	429	51.5%
2024 Q1	1,217	632	195	390	51.9%
Access[1]					
2022	5,146	2,571	863	1,712	50.0%
2023	4,781	2,453	804	1,524	51.3%
2023 Q1	1,210	612	208	390	50.6%
2023 Q2	1,194	607	203	383	50.9%
2023 Q3	1,183	601	199	383	50.8%
2023 Q4	1,193	632	194	368	52.9%
2024 Q1	1,119	599	188	332	53.5%
Calls					
2022	544	213	50	282	39.1%
2023	455	165	36	254	36.2%
2023 Q1	119	43	10	66	36.1%
2023 Q2	119	46	9	64	38.9%
2023 Q3	111	39	9	63	35.1%
2023 Q4	105	36	8	61	34.6%
2024 Q1	98	33	7	58	34.1%

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	26,652	9,552	3,884	13,216	35.8%
2023 Q1	29,365	10,793	4,236	14,336	36.8%
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%

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	23,283	9,968	2,456	10,859	42.8%
2023 Q1	6,477	2,759	691	3,027	42.6%
2023 Q2	5,678	2,384	608	2,686	42.0%
2023 Q3	5,669	2,449	604	2,616	43.2%
2023 Q4	5,458	2,376	553	2,529	43.5%
2024 Q1	5,045	2,191	525	2,329	43.4%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls[1]
2022	541	184	52	166	142
2023	453	144	53	134	126
2023 Q1	119	38	13	35	34
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

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	14,841	6,645	1,658	6,538	44.8%
2023 Q1	4,171	1,861	471	1,839	44.6%
2023 Q2	3,622	1,577	412	1,633	43.5%
2023 Q3	3,588	1,619	401	1,568	45.1%
2023 Q4	3,460	1,588	374	1,498	45.9%
2024 Q1	3,152	1,453	354	1,345	46.1%
International calls					
2022	936	179	54	703	19.1%
2023	782	134	38	610	17.1%
2023 Q1	211	39	11	161	18.5%
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%
Calls to mobiles					
2022	5,545	2,029	527	2,989	36.6%
2023	4,825	1,773	436	2,616	36.7%
2023 Q1	1,278	471	115	692	36.9%
2023 Q2	1,167	422	106	639	36.1%
2023 Q3	1,196	441	114	641	36.9%
2023 Q4	1,183	439	101	643	37.1%
2024 Q1	1,127	415	94	618	36.8%
Other calls[1]					
2022	3,646	1,657	447	1,542	45.5%
2023	2,836	1,416	324	1,096	49.9%
2023 Q1	818	388	94	336	47.5%
2023 Q2	694	353	80	261	50.8%
2023 Q3	697	357	81	259	51.2%
2023 Q4	628	318	69	241	50.7%
2024 Q1	586	295	69	222	50.4%

[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	4,516	2,216	883	1,416	49.1%
2023	4,158	2,104	817	1,236	50.6%
2023 Q1	1,054	524	212	318	49.7%
2023 Q2	1,038	522	207	309	50.3%
2023 Q3	1,022	514	202	307	50.2%
2023 Q4	1,043	544	196	303	52.1%
2024 Q1	977	520	190	267	53.3%
Access[1]					
2022	4,205	2,087	843	1,275	49.6%
2023	3,902	1,994	788	1,119	51.1%
2023 Q1	987	496	204	286	50.3%
2023 Q2	967	489	199	279	50.6%
2023 Q3	963	489	195	279	50.8%
2023 Q4	985	520	190	276	52.8%
2024 Q1	924	498	184	242	53.9%
Calls					
2022	310	129	40	141	41.4%
2023	256	110	29	117	42.9%
2023 Q1	67	28	8	31	41.2%
2023 Q2	71	33	8	30	47.2%
2023 Q3	60	25	7	28	41.1%
2023 Q4	58	24	6	27	41.6%
2024 Q1	53	22	6	25	41.6%

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	20,873	6,525	3,803	10,545	31.3%
2023 Q1	23,263	7,655	4,094	11,514	32.9%
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	20,414	6,432	3,727	10,255	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	14,458	6,724	2,035	5,699	46.5%
2023 Q1	4,088	1,876	579	1,633	45.9%
2023 Q2	3,547	1,591	507	1,449	44.9%
2023 Q3	3,464	1,637	487	1,340	47.3%
2023 Q4	3,358	1,620	462	1,276	48.2%
2024 Q1	3,135	1,529	439	1,167	48.8%

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	310	132	32	63	83
2023	256	106	28	52	71
2023 Q1	67	28	7	13	19
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

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	10,235	4,767	1,494	3,974	46.6%
2023 Q1	2,940	1,355	427	1,158	46.1%
2023 Q2	2,499	1,122	372	1,005	44.9%
2023 Q3	2,432	1,150	356	926	47.3%
2023 Q4	2,364	1,140	339	885	48.2%
2024 Q1	2,186	1,066	320	800	48.8%
International calls					
2022	525	135	52	338	25.7%
2023	413	97	38	278	23.5%
2023 Q1	117	29	11	77	24.7%
2023 Q2	105	23	10	72	22.0%
2023 Q3	96	23	8	65	23.9%
2023 Q4	95	22	9	64	23.1%
2024 Q1	94	21	8	65	22.4%
Calls to mobiles					
2022	2,044	841	278	925	41.1%
2023	1,772	765	233	774	43.2%
2023 Q1	470	198	62	210	42.1%
2023 Q2	435	178	58	199	40.9%
2023 Q3	433	191	57	185	44.1%
2023 Q4	434	198	56	180	45.6%
2024 Q1	404	189	53	162	46.8%
Other calls[1]					
2022	2,525	1,241	371	913	49.2%
2023	2,037	1,095	270	672	53.8%
2023 Q1	561	294	79	188	52.4%
2023 Q2	508	268	67	173	52.7%
2023 Q3	503	273	66	164	54.3%
2023 Q4	465	260	58	147	55.9%
2024 Q1	451	253	58	140	56.1%

[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	1,171	565	29	578	48.2%
2023	1,076	511	23	541	47.5%
2023 Q1	275	131	6	138	47.5%
2023 Q2	275	131	6	138	47.6%
2023 Q3	271	126	6	139	46.5%
2023 Q4	254	124	5	125	48.6%
2024 Q1	239	111	5	123	46.5%
Access[1]					
2022	940	483	20	437	51.4%
2023	879	458	16	404	52.1%
2023 Q1	223	116	4	104	51.8%
2023 Q2	227	118	4	104	52.1%
2023 Q3	221	112	4	105	50.8%
2023 Q4	208	112	4	92	53.9%
2024 Q1	195	100	4	91	51.5%
Calls					
2022	231	81	9	140	35.1%
2023	197	53	7	137	27.0%
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	47	12	1	34	25.3%
2024 Q1	45	11	1	33	24.9%

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	6,134	3,107	154	2,873	50.6%
2023	5,779	3,027	81	2,671	52.4%
2023 Q1	6,102	3,138	142	2,822	51.4%
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	5,650	2,953	74	2,623	52.3%

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	8,822	3,241	421	5,160	36.7%
2023 Q1	2,388	882	112	1,394	36.9%
2023 Q2	2,131	793	101	1,237	37.2%
2023 Q3	2,204	811	117	1,276	36.8%
2023 Q4	2,099	755	91	1,253	36.0%
2024 Q1	1,909	661	86	1,162	34.6%

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	231	52	20	103	55
2023	197	39	24	82	54
2023 Q1	52	10	5	22	14
2023 Q2	48	9	5	20	14
2023 Q3	51	10	6	21	14
2023 Q4	47	9	7	19	12
2024 Q1	45	8	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	5,247	2,101	208	2,938	40.0%
2023	4,606	1,878	164	2,564	40.8%
2023 Q1	1,231	506	44	681	41.1%
2023 Q2	1,123	455	40	628	40.5%
2023 Q3	1,156	469	45	642	40.6%
2023 Q4	1,096	448	35	613	40.9%
2024 Q1	966	387	34	545	40.1%
International calls					
2022	411	44	2	365	10.7%
2023	368	37	0	331	10.0%
2023 Q1	94	10	0	84	10.6%
2023 Q2	90	9	0	81	10.0%
2023 Q3	92	9	0	83	9.7%
2023 Q4	92	9	0	83	9.8%
2024 Q1	87	7	0	80	8.0%
Calls to mobiles					
2022	3,501	1,188	249	2,064	33.9%
2023	3,052	1,008	203	1,841	33.0%
2023 Q1	808	273	53	482	33.8%
2023 Q2	732	244	48	440	33.3%
2023 Q3	763	250	57	456	32.8%
2023 Q4	749	241	45	463	32.2%
2024 Q1	722	226	41	455	31.3%
Other calls[1]					
2022	1,117	412	76	629	36.9%
2023	796	318	54	424	40.0%
2023 Q1	255	93	15	147	36.4%
2023 Q2	186	85	13	88	45.7%
2023 Q3	193	83	15	95	43.0%
2023 Q4	162	57	11	94	35.2%
2024 Q1	134	41	11	82	30.7%

[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	20,629	32.0%
2023 Q1	28,371	2,657	5,465	20,248	32.6%
2023 Q2	28,341	2,538	5,419	20,384	32.5%
2023 Q3	28,378	2,419	5,447	20,512	32.2%
2023 Q4	28,460	2,298	5,533	20,629	32.0%
2024 Q1	28,460	2,201	5,368	20,890	31.7%

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

Q1 2024 (January to March)

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 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
2024 Q1	3,407	2,859	8	14	14	26	39	102	345

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 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
2024 Q1	41.19	7.31	12.42	19.67	0.38	0.30	1.10	7.31	2,497

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 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
2024 Q1	89.02	66.34	22.68	-0.14	74.52%	4.70

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 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
2024 Q1	12.75	15.29	5.36

Table 5: Interconnection call volumes (billions of minutes)

	All operators
2022	61.24
2023	62.54
2023 Q1	16.31
2023 Q2	15.54
2023 Q3	15.17
2023 Q4	15.52
2024 Q1	15.78

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