

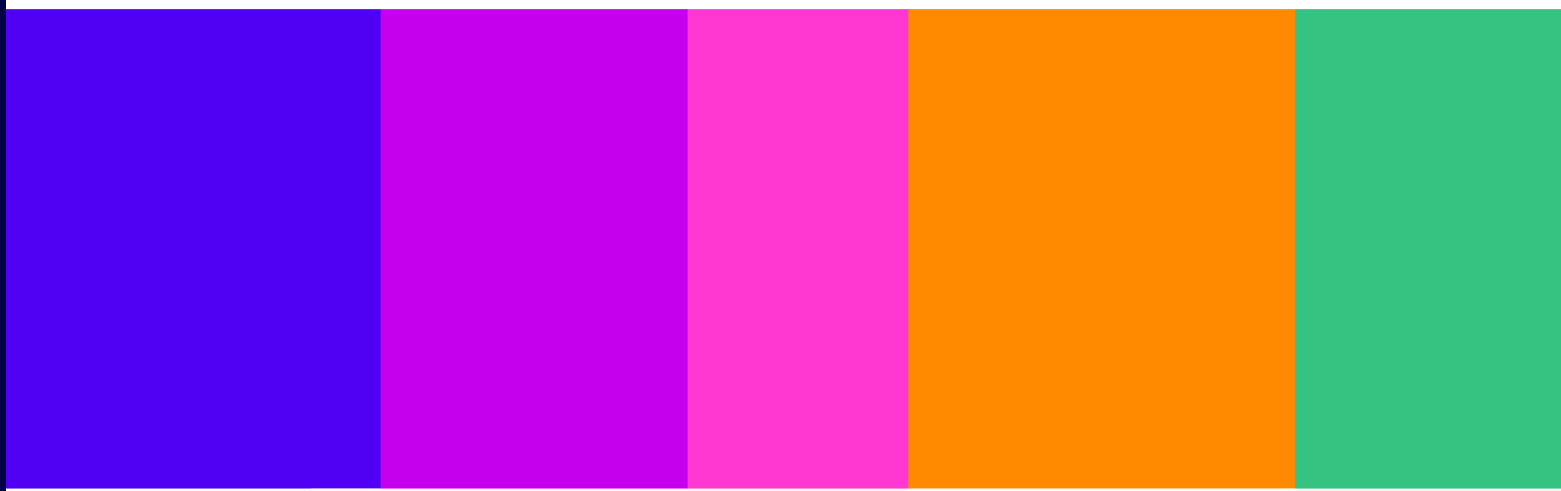


Telecommunications Market Data Update

Q4 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 £1.15bn in Q4 2024; a decrease of £43.4m (3.6%) from the previous quarter and a decrease of £157.4m (12.0%) year-on-year. BT's share of these revenues was 49.8%.
- The total number of fixed lines (including PSTN lines, ISDN channels and managed VoIP connections) declined by 1.2 million (4.8%) during the quarter to 23.8 million.
- Total fixed-originated call volumes fell by 1,375 million minutes (25.0%) year on year, to 4.12 billion minutes.

Fixed broadband services

- There were 29.2 million fixed broadband lines at the end of Q4 2024, an increase of 691k (2.4%) year on year.
- There were 22.0 million 'other inc. FTTx' broadband connections (predominantly fibre-to-the-cabinet and full fibre connections) at the end of Q4 2024, accounting for 75.6% of all lines.
- The number of ADSL lines decreased by 121k (6.2%) during the quarter, while the number of cable lines fell by 36k (0.7%) and the number of 'other inc. FTTx' lines grew by 223k (1.0%).

Mobile services

- Mobile telephony services generated £3.53bn in retail revenues in Q4 2024, a £46.4m (1.3%) increase from a year previously.
- Average monthly retail revenue per subscriber was £13.21 in Q4 2024, with post-pay subscribers generating more revenue than pre-pay users (averaging £15.97 compared to £5.26 for pre-pay).
- The number of active mobile subscriptions (excluding M2M) was 88.9 million at the end of Q4 2024, down 259k (0.3%) from the year before.
- Over the same period, the number of dedicated mobile broadband subscriptions decreased by 32k (0.7%) to 4.8 million.
- The number of mobile-originated voice call minutes declined by 3.20 billion (7.7%) to 38.62 billion minutes year-on-year, with calls to landlines decreasing by 11.3% to 6.55 billion minutes.
- The number of mobile messages (including SMS and MMS) saw a year-on-year decline, down 1.11 billion messages (14.3%) to 6.70 billion.
- Data usage increased, with volumes up 178 PB (7.2%) year-on-year to 2652 PB.

2. Fixed Telecoms market data tables

Q4 2024 (October to December)

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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 & calls¹					
2023	5,248	2,617	840	1,790	49.9%
2024	4,813	2,416	747	1,649	50.2%
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%
2024 Q4	1,151	574	179	398	49.8%
Access¹					
2023	4,790	2,453	804	1,534	51.2%
2024	4,442	2,293	723	1,426	51.6%
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%
2024 Q4	1,063	545	173	345	51.3%
Calls					
2023	457	165	36	256	36.1%
2024	370	123	25	223	33.1%
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	32.0%
2024 Q4	88	29	6	54	32.6%

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
2023	26,876	9,552	3,884	13,440	35.5%
2024	23,773	7,602	3,480	12,691	32.0%
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	24,966	8,484	3,612	12,870	34.0%
2024 Q4	23,773	7,602	3,480	12,691	32.0%

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

	All Operators	BT	Virgin Media	Other	BT Share
2023	23,312	9,968	2,456	10,888	42.8%
2024	18,012	7,514	1,854	8,644	41.7%
2023 Q4	5,494	2,376	553	2,565	43.2%
2024 Q1	5,103	2,191	525	2,387	42.9%
2024 Q2	4,539	1,886	466	2,187	41.6%
2024 Q3	4,250	1,756	436	2,058	41.3%
2024 Q4	4,120	1,681	427	2,012	40.8%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls ¹
2023	457	145	53	135	124
2024	370	106	51	112	101
2023 Q4	106	33	14	31	28
2024 Q1	99	31	13	29	26
2024 Q2	94	26	12	29	27
2024 Q3	88	24	13	28	23
2024 Q4	88	24	13	26	25

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					
2023	14,864	6,645	1,658	6,561	44.7%
2024	11,209	4,975	1,253	4,981	44.4%
2023 Q4	3,486	1,588	374	1,524	45.6%
2024 Q1	3,197	1,453	354	1,390	45.4%
2024 Q2	2,833	1,246	316	1,271	44.0%
2024 Q3	2,637	1,161	294	1,182	44.0%
2024 Q4	2,542	1,115	289	1,138	43.9%
International calls					
2023	782	134	38	610	17.1%
2024	667	97	29	541	14.6%
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	162	24	7	131	14.8%
2024 Q4	158	21	7	130	13.3%
Calls to mobiles					
2023	4,825	1,773	436	2,616	36.7%
2024	4,056	1,406	337	2,313	34.7%
2023 Q4	1,188	439	101	648	37.0%
2024 Q1	1,129	415	94	620	36.8%
2024 Q2	1,010	349	84	577	34.5%
2024 Q3	957	320	80	557	33.4%
2024 Q4	959	322	79	558	33.6%
Other calls¹					
2023	2,840	1,416	324	1,100	49.9%
2024	2,080	1,036	235	809	49.8%
2023 Q4	632	318	69	245	50.3%
2024 Q1	595	295	69	231	49.6%
2024 Q2	532	267	59	206	50.2%
2024 Q3	493	251	55	187	50.9%
2024 Q4	460	223	52	185	48.5%

¹Includes 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 & calls¹					
2023	4,171	2,104	817	1,249	50.5%
2024	3,813	1,973	731	1,110	51.7%
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%
2024 Q4	907	465	175	267	51.2%
Access¹					
2023	3,913	1,994	788	1,131	51.0%
2024	3,618	1,898	710	1,010	52.5%
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	905	481	176	249	53.1%
2024 Q4	861	447	170	244	51.9%
Calls					
2023	257	110	29	118	42.7%
2024	195	75	21	100	38.3%
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	35.7%
2024 Q4	46	17	5	23	38.1%

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
2023	21,097	6,525	3,803	10,769	30.9%
2024	18,565	4,855	3,435	10,275	26.1%
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	19,591	5,636	3,560	10,395	28.8%
2024 Q4	18,565	4,855	3,435	10,275	26.1%

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

	All Operators	BT	Virgin Media	Other	BT Share
2023	14,503	6,724	2,035	5,744	46.4%
2024	11,389	5,358	1,564	4,467	47.0%
2023 Q4	3,394	1,620	462	1,312	47.7%
2024 Q1	3,210	1,529	439	1,242	47.6%
2024 Q2	2,872	1,354	391	1,127	47.2%
2024 Q3	2,704	1,267	370	1,067	46.9%
2024 Q4	2,603	1,208	364	1,031	46.4%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls ¹
2023	257	106	28	52	71
2024	195	75	23	42	56
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
2024 Q4	46	17	5	10	13

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					
2023	10,267	4,767	1,494	4,006	46.4%
2024	7,816	3,663	1,135	3,018	46.9%
2023 Q4	2,390	1,140	339	911	47.7%
2024 Q1	2,239	1,066	320	853	47.6%
2024 Q2	1,972	924	285	763	46.9%
2024 Q3	1,837	853	267	717	46.4%
2024 Q4	1,769	820	263	686	46.4%
International calls					
2023	414	97	38	279	23.4%
2024	332	73	29	230	22.0%
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	79	18	7	54	22.7%
2024 Q4	76	16	7	53	21.1%
Calls to mobiles					
2023	1,778	765	233	780	43.0%
2024	1,573	706	199	668	44.9%
2023 Q4	439	198	56	185	45.1%
2024 Q1	414	189	53	172	45.6%
2024 Q2	392	177	49	166	45.2%
2024 Q3	379	169	48	162	44.6%
2024 Q4	388	171	49	168	44.1%
Other calls¹					
2023	2,043	1,095	270	678	53.6%
2024	1,667	916	201	550	54.9%
2023 Q4	470	260	58	152	55.4%
2024 Q1	461	253	58	150	54.8%
2024 Q2	426	235	50	141	55.1%
2024 Q3	409	227	48	134	55.5%
2024 Q4	371	201	45	125	54.2%

¹Includes 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 & calls¹					
2023	1,075	511	23	541	47.6%
2024	998	442	16	540	44.3%
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%
2024 Q4	244	109	4	131	44.7%
Access¹					
2023	877	458	16	403	52.2%
2024	824	395	13	416	47.9%
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%
2024 Q4	201	98	3	101	48.6%
Calls					
2023	198	53	7	138	26.9%
2024	174	47	4	123	26.9%
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	27.7%
2024 Q4	42	11	1	31	26.0%

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
2023	5,779	3,027	81	2,671	52.4%
2024	5,209	2,747	46	2,416	52.7%
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	5,375	2,848	52	2,475	53.0%
2024 Q4	5,209	2,747	46	2,416	52.7%

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

	All Operators	BT	Virgin Media	Other	BT Share
2023	8,806	3,241	421	5,144	36.8%
2024	6,620	2,153	290	4,177	32.5%
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%
2024 Q4	1,517	473	63	981	31.2%

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls ¹
2023	198	39	24	82	54
2024	174	31	28	70	46
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
2024 Q4	42	7	8	16	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					
2023	4,598	1,878	164	2,556	40.8%
2024	3,393	1,312	118	1,963	38.7%
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%
2024 Q4	774	295	26	453	38.1%
International calls					
2023	368	37	0	331	10.1%
2024	334	24	0	310	7.2%
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%
2024 Q4	82	5	0	77	6.1%
Calls to mobiles					
2023	3,046	1,008	203	1,835	33.1%
2024	2,484	700	138	1,646	28.2%
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%
2024 Q4	572	151	30	391	26.4%
Other calls¹					
2023	794	318	54	422	40.0%
2024	409	117	34	258	28.6%
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%
2024 Q4	89	22	7	60	24.7%

¹Includes 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
2023	28,460	2,298	5,533	20,629	32.0%
2024	29,151	1,833	5,269	22,049	30.4%
2023 Q4	28,460	2,298	5,533	20,629	32.0%
2024 Q1	28,460	2,201	5,368	20,890	31.7%
2024 Q2	28,992	2,082	5,327	21,582	30.7%
2024 Q3	29,086	1,955	5,305	21,826	30.7%
2024 Q4	29,151	1,833	5,269	22,049	30.4%

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 2024 (October to December)

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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
2023	13,675	11,322	43	56	65	117	169	424	1,480
2024	14,109	11,812	31	54	56	104	176	432	1,444
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
2024 Q4	3,534	2,961	7	13	13	25	45	110	361

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
2023	164.77	29.63	48.70	77.96	1.85	1.72	4.91	31.68	9,405
2024	157.67	27.38	47.85	75.52	1.41	1.33	4.19	27.98	10,382
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
2024 Q4	38.62	6.55	11.87	18.58	0.32	0.29	1.01	6.70	2,652

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
2023	89.15	66.15	23.00	2.48	74.2%	4.82
2024	88.89	66.18	22.70	-0.26	74.46%	4.79
2023 Q4	89.15	66.15	23.00	0.17	74.2%	4.82
2024 Q1	89.02	66.34	22.68	-0.13	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
2024 Q4	88.89	66.18	22.70	-0.64	74.46%	4.79

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
2023	12.98	15.73	5.18
2024	13.17	15.88	5.36
2023 Q4	13.05	15.80	5.33
2024 Q1	12.75	15.30	5.36
2024 Q2	13.37	16.08	5.48
2024 Q3	13.37	16.17	5.35
2024 Q4	13.21	15.97	5.26

Table 5: Interconnection call volumes (billions of minutes)

	All operators
2023	62.54
2024	61.17
2023 Q4	15.52
2024 Q1	15.78
2024 Q2	15.39
2024 Q3	14.92
2024 Q4	15.08

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