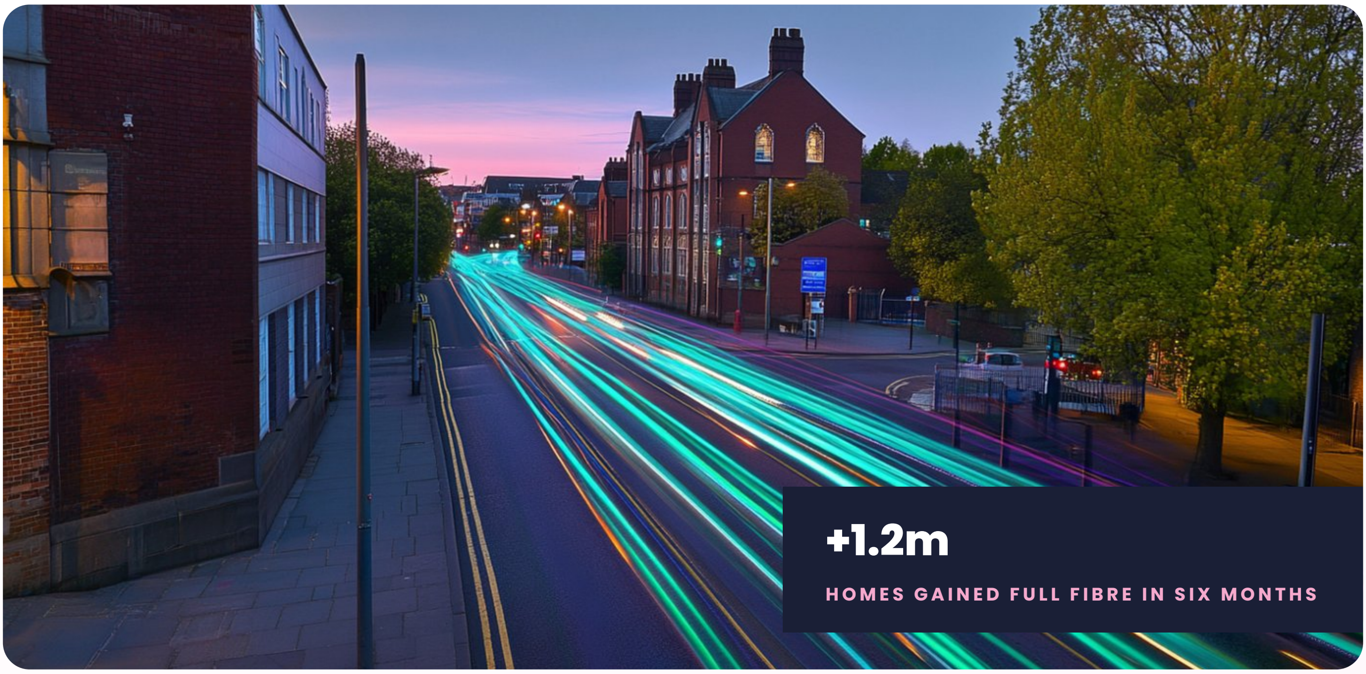
Broadband Switch.uk

REPORT NO. 29 · SPRING 2026 DATA · JULY 2026

The 82% *Country.*

Ofcom's new Connected Nations data puts full fibre outside **24.9 million** front doors, and finds 14 million households who have not yet opened theirs. We rebuilt the regulator's raw files line by line to show what the Spring 2026 update really means.

By **Dr. Alex J. Martin-Smith** CMgr DBA · Reviewed by **Adrian James** · BroadbandSwitch.uk



+1.2m

HOMES GAINED FULL FIBRE IN SIX MONTHS

82%
of UK homes can now get full fibre, 24.9 million of 30.5 million

89%
of homes are gigabit capable, 27.1 million in total

47%
take-up of full fibre where it is available, up from 42%

39,000
premises still cannot get decent broadband from fixed or fixed wireless

FULL FIBRE · TAKE-UP · FOUR NATIONS · RURAL DIVIDE · 5G & MOBILE

PUBLICATION DETAILS

About this report

The 82% Country is Report No. 29 in the independent research series from BroadbandSwitch.uk, part of the SearchSwitchSave group. It is our full analysis of Ofcom's Connected Nations update: Spring 2026, published by the regulator on 13 May 2026 with a data snapshot of January 2026. It is prepared to a point-in-time standard: every statistic is attributed to a named, dated source, and the reference list at the back lets any reader check any figure. Uniquely for this edition, the headline statistics were not taken from Ofcom's summary text. They were recomputed by us from Ofcom's raw open data files, covering all 361 UK local and unitary authorities, 650 Westminster constituencies, 131 devolved constituencies and the full 154 column mobile dataset, and the two presentations reconcile exactly.

IMPORTANT NOTICES

Point in time. Version 1.2, published July 2026, incorporating a July 2026 stakeholder and accuracy review. All data was checked to 24 July 2026 and coverage figures describe January 2026, so treat them as a floor: networks have kept building since. Verify current availability at your own address before acting.

Analysis, not advice. This report is independent analysis of UK broadband and mobile coverage. It is not financial, legal or contractual advice. Your best option depends on your address, your usage and your circumstances.

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Corrections are welcome, answered and published.

FOREWORD

The country we finished *building*

Most coverage of Ofcom's data asks how fast the network is growing. The more useful question is quieter: now that fibre passes four homes in every five, why do most of them still not use it?

When Ofcom published this update on 13 May, the headlines wrote themselves: 82% full fibre, 89% gigabit, records everywhere. In the weeks since, we have done something slower. We took the regulator's raw data files, all of them, and rebuilt the analysis from the bottom up: every local authority, every constituency, every operator's mobile footprint. Partly that was diligence. Mostly it was curiosity about what the press release left out.

The answer is the gap this report is named for. The infrastructure race that has defined UK telecoms for a decade is nearly won, and the numbers in Section 1 are genuinely a national achievement. But sitting inside them is a quieter figure: 47% take-up. Roughly 14 million homes and businesses now have a full fibre network at the kerb and have never ordered it, many still paying loyalty prices for yesterday's copper.

One verification result gave us particular satisfaction. Ofcom's headline says around 39,000 premises still cannot get a decent connection. Summed across all 361 local authorities in the raw files, the total is 39,072. The numbers check out to the last row, and this report holds itself to the same standard: every figure dated, every source named, our own calculations labelled as such.

If this report does one thing, I hope it moves the national conversation on from how much fibre we have built to how many people actually benefit. The first question is nearly answered. The second is where every pound of consumer value now lives.

"The UK no longer has a broadband coverage problem. It has a broadband awareness problem, fourteen million front doors deep."

Dr. Alex J. Martin-Smith CMgr DBA · Founder, BroadbandSwitch.uk

Dr. Alex J. Martin-Smith

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Dated figures. Named sources. *Nothing guessed.* That is the whole method.

EXECUTIVE SUMMARY

Spring 2026, on one page

Fibre is probably in your street already. Full fibre now passes 24.9 million UK homes, 82% of the 30.5 million total, after 1.2 million homes were added in just six months. Gigabit capable coverage reached 89% (27.1 million homes) and superfast has been effectively universal at 98% for years. We verified each figure against Ofcom's raw files: the unrounded values are 81.8% and 88.9%.

Take-up is the real headline. Connections on full fibre jumped 1.8 million in six months to 12.4 million, lifting take-up from 42% to 47% of premises passed. That is the fastest rise on record, and it still leaves roughly 14 million premises sitting under a fibre network they have never ordered, the single largest pool of unclaimed consumer value in UK telecoms.

The map still decides. Northern Ireland leads the nations at 96% of homes, Wales has surged to 82% and now matches England, and Scotland trails at 75%. At council level the spread runs from Kingston upon Hull at 99.6% to Na h-Eileanan Siar at 12.0%, and rural homes (66% full fibre) remain a different country from urban ones (84%).

The excluded tail keeps shrinking. Premises unable to get a decent 10 Mbit/s connection from any fixed or fixed wireless provider fell from 44,000 to about 39,000, and Ofcom estimates only around 4,000 lack an affordable option once satellite is counted.

Mobile quietly delivered. 4G from all four operators now covers 84% of UK landmass, 5G from at least one operator reaches 98% of premises outdoors, and 5G standalone spans 49% to 85% across the three networks that have launched it.

82%
of homes can get full fibre, up from 78% in July 2025

+1.8m
full fibre connections added in six months, to 12.4 million

14m
premises passed by fibre but not yet connected (derived)

96%
full fibre in Northern Ireland, the best covered nation

39,072
premises without decent broadband, summed from the raw files

THE WHOLE REPORT IN ONE SENTENCE

The UK has all but finished building a full fibre country, so the value has moved from the trench to the doorstep: the households and small firms who check what their street can now get, and the 14 million who do not, are the whole story of the next three years.

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What's inside

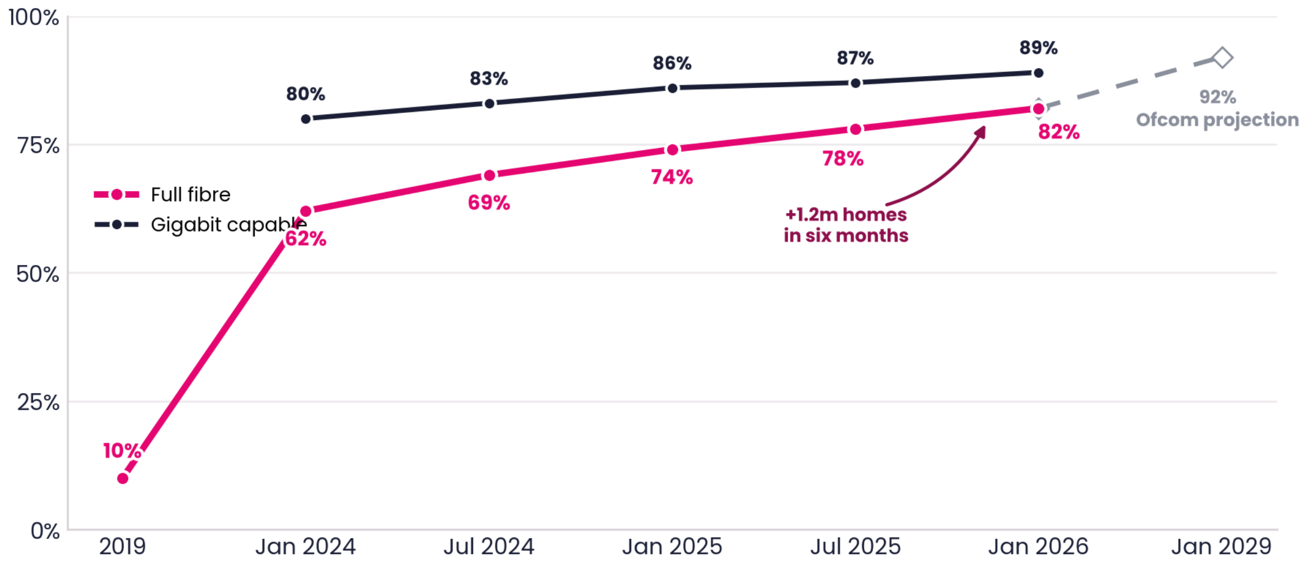
OPENING

THE EVIDENCE

REFERENCE

01 The 82% *moment*

In 2019, one UK premise in ten could get full fibre. In January 2026 it is more than four homes in five, and the pace is still accelerating: the latest four point jump took six months, not a year.



From one in ten to four in five, in seven years

Source: Ofcom Connected Nations series, 2019 to Spring 2026; the January 2029 point is Ofcom's Planned Network Deployments projection, not achieved coverage. Interim 2024 and January 2025 points for both series as reproduced from Ofcom tables; see the method appendix. Refs [8], [9], [11], [14].

The number itself is worth stating precisely. Ofcom's raw January 2026 file counts **24,899,733 residential premises** with full fibre available, which is 81.8% of the UK's 30,455,777 homes, published as 82% and 24.9 million. Six months earlier the figure was 78%. A build that added 1.2 million homes in half a year is not a market slowing down as it matures. It is a market sprinting for the finish.

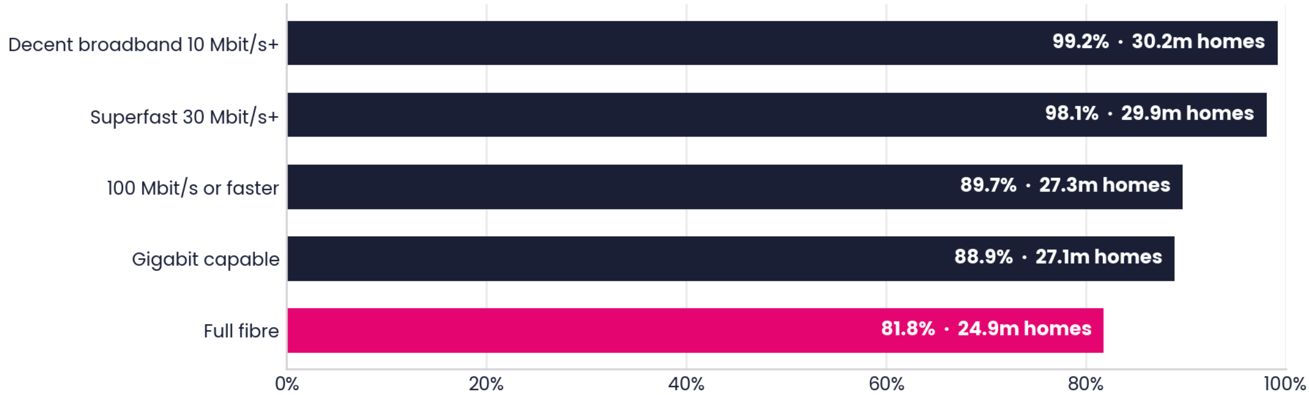
Gigabit capable coverage, which adds Virgin Media's upgraded cable network to the fibre builders, reached **88.9% of homes (27,082,109)**, published as 89% and 27.1 million.

IN SHORT · WHAT COUNTS AS FULL FIBRE

A connection where the fibre optic cable runs all the way into your home, known as fibre to the premises. Part fibre products that finish the journey over copper phone lines or coaxial cable do not count, however they are branded. All full fibre is gigabit capable, but not all gigabit lines are full fibre.

82% OR 81%? BOTH ARE RIGHT

82% is the share of homes, meaning residential premises only (30.5 million of them). Across all premises, which adds 2.0 million business addresses to make 32.5 million, the figure is 81.0%. This report states the base beside every figure, and you should be suspicious of any coverage claim that does not.

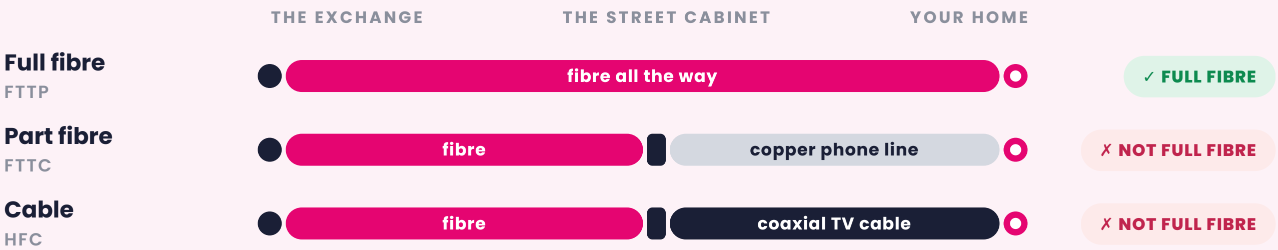


The coverage ladder: what UK homes can order, January 2026

Source: Ofcom open data, January 2026 snapshot, residential premises, recomputed by BroadbandSwitch.uk. Each rung is the share of homes able to order at least that tier, with the equivalent number of homes inside each bar. Ref [12].

What actually counts as full fibre?

Follow each cable's journey from the exchange to your front door. Only the top row counts.



The one line test: if the fibre itself reaches your front door, it is full fibre. If copper or coaxial does the final stretch from the cabinet, it can still be fast, and cable can even be gigabit capable, but it is not full fibre, whatever the advert says. Definitions: ref [10].

HOW WE VERIFIED THE HEADLINES

We did not take Ofcom's summary text on trust. Every headline in this report was recomputed from the regulator's raw open data: the UK and nations file, all 361 local authority files, the take-up file and the full mobile dataset. Ofcom's published figures matched the raw data in every case we tested, including the 39,000 exclusion figure, which sums to exactly 39,072. Where a number appears only in Ofcom's narrative and not in the data files, the method appendix says so.

24.9m

homes passed by full fibre, from 23.7 million in July 2025

98.1%

of homes can get superfast, unchanged and effectively complete

99.2%

of homes can get at least a decent 10 Mbit/s fixed line

SECTION 02 · THE EVIDENCE

02 Six months *on*

Our **Connected Nations 2025 analysis**, published in April, was built on Ofcom's July 2025 snapshot. Half a year of trenching, splicing and switching later, here is the like for like scorecard.

UK headline metrics: July 2025 against January 2026 (Ofcom, refs [9], [11], [12])

Metric	Jul 2025 (CN2025)	Jan 2026 (Spring 2026)	Change
Full fibre availability (homes)	78% · 23.7m	**82% · 24.9m**	**+4 points · +1.2m homes**
Gigabit capable (homes)	87% · 26.4m	**89% · 27.1m**	**+2 points · +0.7m homes**
Superfast 30 Mbit/s+ (homes)	98%	**98%**	No change
Full fibre take-up (share of premises passed)	42% · 10.6m connections	**47% · 12.4m connections**	**+5 points · +1.8m connections**
Premises without decent broadband (fixed or FWA)	44,000	**39,000**	**Down 5,000**

Three of the five lines moved, and all three moved the right way. The build accelerated, take-up recorded its steepest six month climb yet, and the excluded tail shrank by more than a tenth. The one line that did not move is the most reassuring of all: superfast has been parked at 98% for years because it is, to a first approximation, finished.

The most consequential shift is the take-up line. For a decade the UK built networks faster than households joined them, and the gap between the two only widened. This is the first update where the connection count grew faster in absolute terms than at any point on record, 1.8 million in six months, without the availability line slowing at all.

Why does that matter beyond the statistics? Because a market with 14 million passed but unconnected premises is a market where every provider, incumbent and challenger alike, is fighting for the same switchers. Aggressive pricing for new customers is the direct consequence, and as our **Loyalty Penalty report** set out this month, the difference between engaging with that market and ignoring it is now worth £84 to £108 a year to a typical household on Ofcom's measure.

IN SHORT · WHY TWO SNAPSHOTS A YEAR

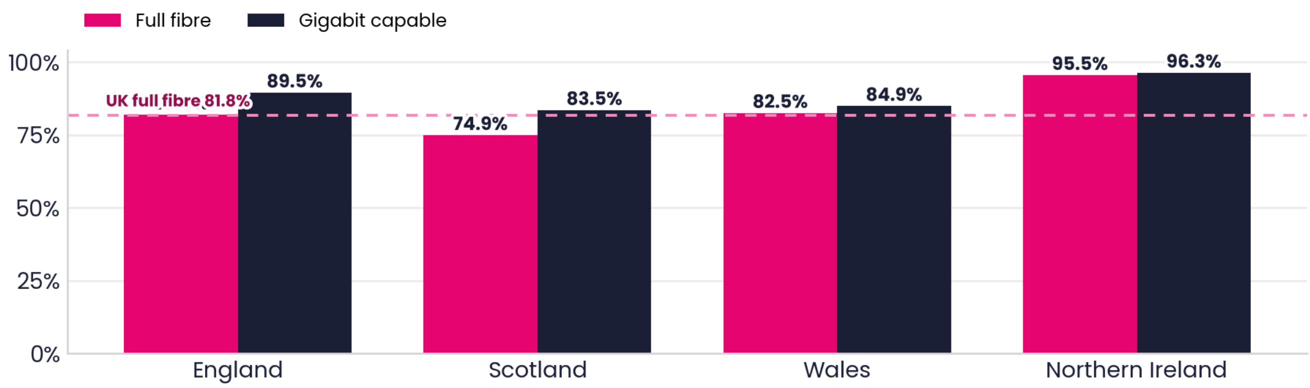
Ofcom publishes the full Connected Nations report each autumn and an interim update each spring. The spring editions use a January snapshot, so this data describes the network as it stood in January 2026, and it has kept growing since.

SECTION 03 · THE EVIDENCE

03 Four nations, *two stories*

Availability and adoption tell different stories in every nation. Northern Ireland leads both. Wales just achieved something remarkable. Scotland is the fastest improver from the lowest base.

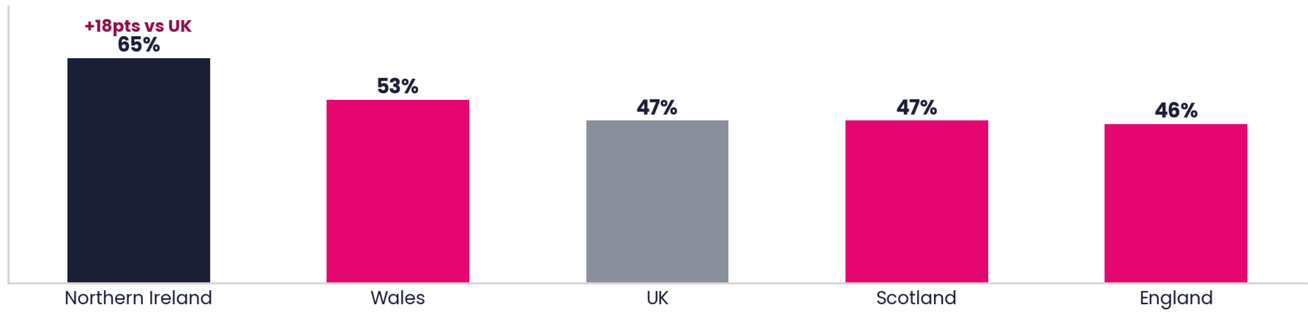
AVAILABILITY · Who can get full fibre, by nation



Availability by nation, January 2026 (homes)

Source: Ofcom open data, January 2026, residential premises, recomputed by BroadbandSwitch.uk; values shown on the chart. Ref [12].

TAKE-UP · Who has actually taken it, by nation



Take-up of full fibre where it is available, January 2026

Source: Ofcom Spring 2026 tables; the share of premises with access that have an active connection. Northern Ireland's decade of fibre familiarity shows: adoption there runs almost twenty points ahead of Great Britain. Refs [8], [11].

Northern Ireland remains the UK's fibre capital: 95.5% of homes passed, 96.3% gigabit capable, and 65% of premises with access actually connected, helped latterly by the publicly funded Project Stratum build. When fibre has been normal for years, using it becomes normal too, and NI councils dominate the national take-up leaderboard in Section 5.

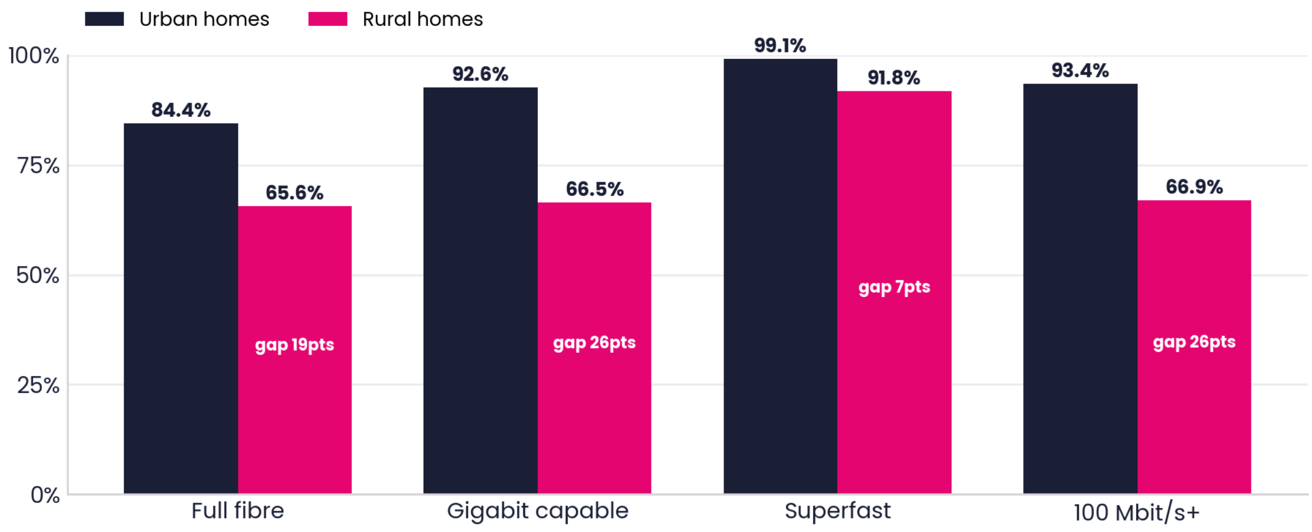
Wales is this update's quiet landmark. At 82.5%, Welsh homes now have marginally better full fibre availability than English ones, an outcome that would have sounded fanciful five years ago, and Welsh take-up (53%) leads Great Britain.

Scotland still trails on availability, at 74.9% full fibre and 83.5% gigabit, with island geography doing much of the explaining. Cable softens the gap, the publicly funded R100 programme passed 100,000 connections in June 2026, and Scottish take-up now matches the UK average.

England sits almost exactly on the UK average by arithmetic necessity, at 82.0% and 89.5%, with the real variation living at council level rather than national level.

04 Urban and rural: still *two countries*

Average a city and a glen and you get a comforting number. Split them apart and January 2026 still describes two different broadband nations living under one flag.



The rural gap, tier by tier (homes, January 2026)

Source: Ofcom open data, January 2026, residential premises, recomputed by BroadbandSwitch.uk, with the urban to rural gap labelled inside each pair. Ref [12].

On full fibre the gap is 19 points: 84.4% of urban homes against 65.6% of rural ones. On gigabit it widens to 26 points, because the cable network that lifts urban figures barely exists outside towns. And on the measure that matters most for basic participation, the difference is starkest of all: **3.8% of rural homes cannot get a decent fixed line connection, against 0.3% in urban areas**, a ratio of more than ten to one.

Two honest caveats belong beside that. First, rural superfast at 91.8% means nine rural homes in ten can already get a perfectly serviceable connection. Second, the alternatives for the rest have never been stronger, from fixed wireless to 4G and 5G home broadband to satellite, and Section 7 takes up their story.

Old streets, new speed: the remaining build runs through Britain's hardest geography.

19pts

the urban to rural full fibre gap, 84.4% against 65.6%

10x

a rural home is more than ten times as likely to lack a decent fixed line

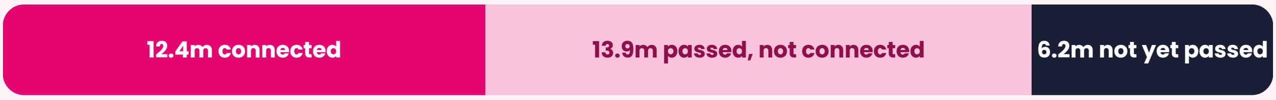
SECTION 05 · THE EVIDENCE

05 The fourteen *million*

Here is the whole report in one picture. Count every premise in the country, then ask how many have fibre outside, and how many of those have ever ordered it.

The fibre gap, in premises

All 32.5 million UK premises, homes and businesses, January 2026.



The pale block is the gap: premises where full fibre is available today and no order has ever been placed. Sources: Ofcom raw data for the 26.3 million passed and the 32.5 million base; Ofcom Spring 2026 for the 12.4 million connections; the 13.9 million gap is derived by subtraction. The blocks sum: 12.4m + 13.9m + 6.2m = 32.5m. Refs [11], [12].

Take-up reached **47% of premises passed** in January 2026, up from 42% six months earlier and just 33% two years ago. One definition matters throughout this report: take-up is measured against the premises that can already get full fibre, not against every address in the country. The direction is emphatic. The level is the point: even after the fastest adoption run on record, most premises that can have full fibre do not, and the unconnected majority is not concentrated anywhere convenient. It is everywhere, on almost every upgraded street in the country.

The reasons are mundane rather than mysterious. Households wait out contracts. Marketing letters go unread. Flats wait on wayleaves. And a product that arrives silently under the pavement, unlike a visible new supermarket or bus route, is easy never to notice at all.

What the gap is not, on the evidence of Section 5's league tables, is a story about money. The lowest take-up in the UK is in Kensington and Chelsea, the least deprived council in Britain by most measures, at 19%. The highest is Hull, at 78%. Familiarity, not affluence, is what fills a fibre network.

For the industry, 13.9 million unconnected premises passed is the entire commercial battlefield of the next three years, and the reason, as our **Great Consolidation report** argued, that networks without customers are merging with networks that have them.

> ***Familiarity, not affluence, is what fills a fibre network. Hull connects at 78%. Kensington and Chelsea connects at 19%.***
>
> The 82% Country, Section 5

Take-up: the top five councils

Local authority	Take-up
Kingston upon Hull	78%
Ards and North Down	75%
Mid and East Antrim	74%
Armagh City, Banbridge and Craigavon	73%
Milton Keynes	72%

Take-up: the bottom five councils

Local authority	Take-up
Kensington and Chelsea	19%
Isles of Scilly	20%
Blackpool	22%
Oxford	22%
West Dunbartonshire	23%

Source: Ofcom full fibre take-up file, January 2026, share of premises with full fibre coverage that have an active connection, recomputed by BroadbandSwitch.uk from all 361 rows. This is a conversion rate, not a share of all premises. Ref [12].

Hull's crown is no accident: KCOM built the city full fibre years before anyone else, so an entire local market has simply completed the adoption curve the rest of the country is still climbing. The Northern Ireland cluster behind it tells the same story at national scale. At the other end, the bottom five mixes central London flats, island logistics and seaside urban stock, three very different geographies united by one behaviour: the network arrived, and most residents have not acted on it.

The network is already on the street. The decision to use it happens behind the front door.

TAKE ACTION

Two minutes, one postcode

If your street was upgraded in the last two years, you are exactly the customer every network is competing for. Check your contract end date before you decide anything.

See live prices at your address →

SECTION 06 · THE EVIDENCE

06 The postcode *lottery*

We ranked all 361 UK local and unitary authorities from Ofcom's raw file. Seventy two are now at 90% full fibre or better. Eight remain below half. The two ends of the table are 88 points apart.

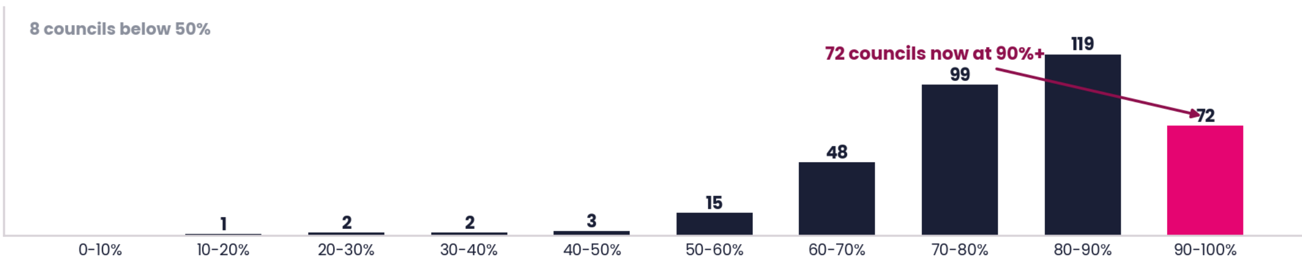
Full fibre availability: top five

Local authority	Coverage
Kingston upon Hull	99.6%
Southend-on-Sea	97.6%
Antrim and Newtownabbey	96.7%
Bracknell Forest	96.7%
Coventry	96.7%

Full fibre availability: bottom five

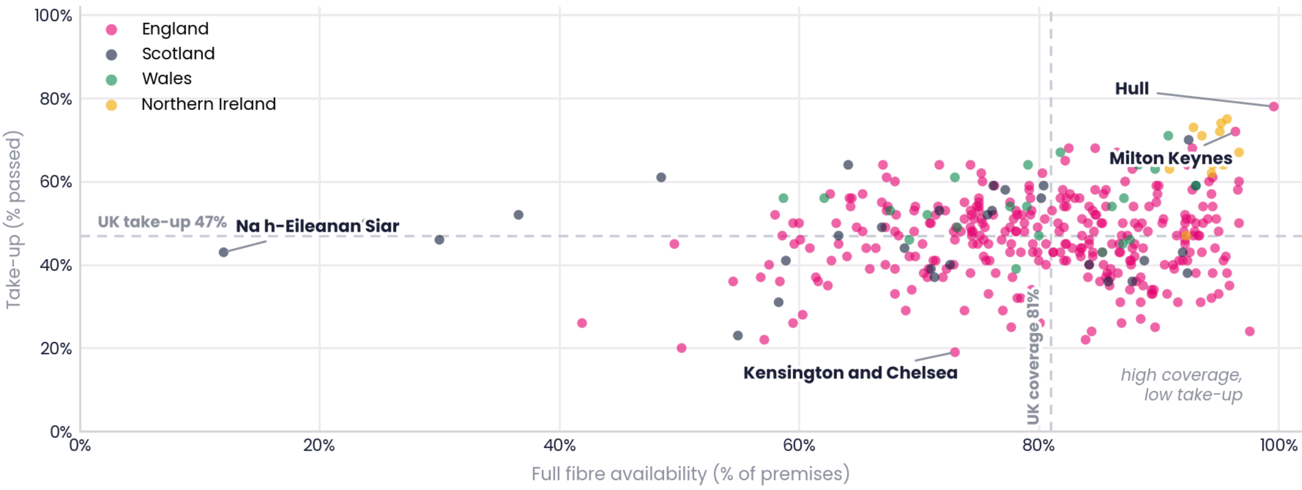
Local authority	Coverage
Na h-Eileanan Siar	12.0%
Shetland Islands	20.0%
Argyll and Bute	23.9%
Orkney Islands	30.0%
Perth and Kinross	36.6%

Source: Ofcom fixed coverage local authority file, January 2026, all premises, recomputed by BroadbandSwitch.uk. Ref [12].



The distribution: how 361 councils spread across the availability bands

Source: Ofcom open data, January 2026, all premises, computed by BroadbandSwitch.uk. One council in five now sits at 90% or better. Ref [12].



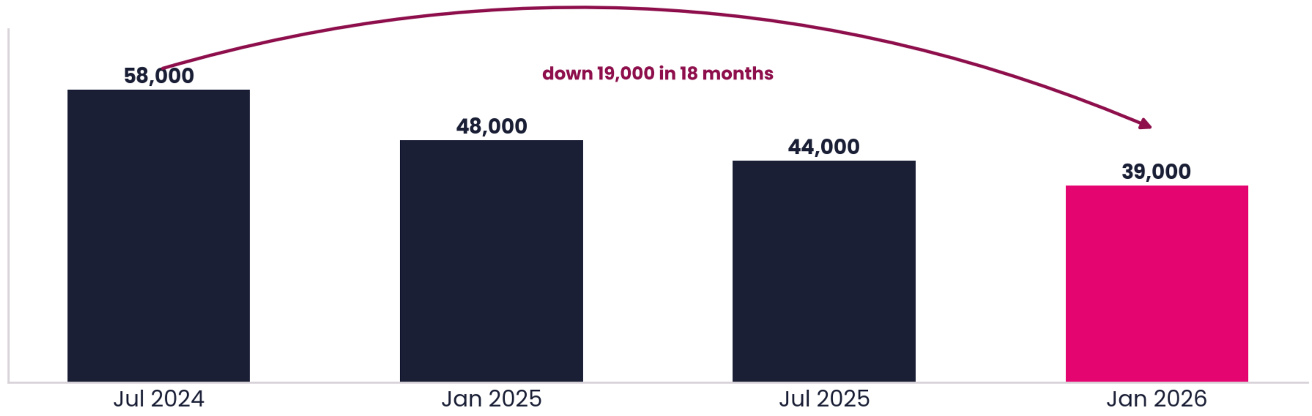
361 councils in one picture: where the network is, against where the customers are

Source: Ofcom open data, January 2026, recomputed by BroadbandSwitch.uk. Each dot is one local authority. The bottom right mass, high coverage and low adoption, is Section 5's fourteen million drawn as geography; Hull sits alone at the top right. Colours show nation. Refs [11], [12].

SECTION 07 · THE EVIDENCE

07 The final *39,000*

Behind every record coverage number sits the tail that has none of it. In January 2026 that tail shrank again, and for the first time an affordable option exists for almost every address in the country.



The excluded tail keeps shrinking

Source: Ofcom Connected Nations series, premises unable to receive decent broadband (at least 10 Mbit/s download and 1 Mbit/s upload) from a fixed line or fixed wireless provider, all premises. The January 2026 figure sums to 39,072 in the raw local authority file. Refs [9], [11], [12].

Decent broadband is Ofcom's floor: 10 Mbit/s down and 1 Mbit/s up, the threshold behind the legal Universal Service Obligation. About 39,000 premises cannot get it from any fixed or fixed wireless network, and unsurprisingly the raw file shows them clustered where the fibre map is thinnest: Na h-Eileanan Siar (2.8% of premises), Argyll and Bute (2.1%), Orkney (2.0%) and Powys (2.0%).

The genuinely new development is affordability. Counting satellite services, Ofcom estimates only around **4,000 premises** now lack access to an affordable decent connection, a collapse driven by cheaper Starlink pricing. Exclusion is becoming a choice of technology rather than an absence of options. One caveat travels with that: satellite needs a clear view of the sky, suits few flats, and its pricing has moved more than once, so the 4,000 is an estimate with moving parts.

IN SHORT · THE USO

If you cannot get decent broadband, the Universal Service Obligation gives you the legal right to request a connection from BT, or KCOM in the Hull area, subject to a cost cap. Fixed wireless, 4G and 5G home broadband and satellite are usually the faster routes in practice.

39,072

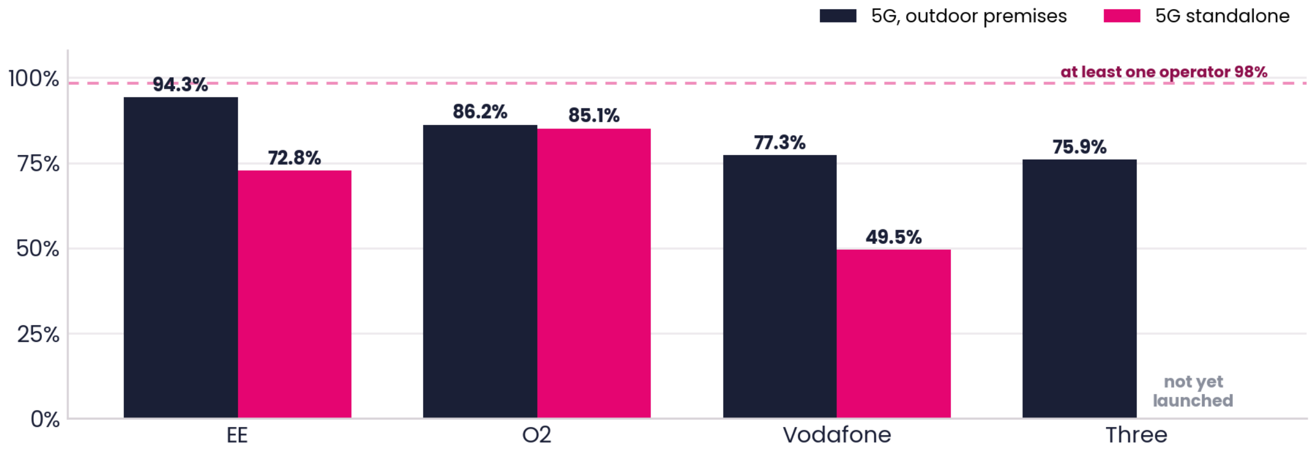
premises without a decent fixed or fixed wireless option, summed from the raw file

~4,000

without an affordable decent option once satellite is counted (Ofcom estimate)

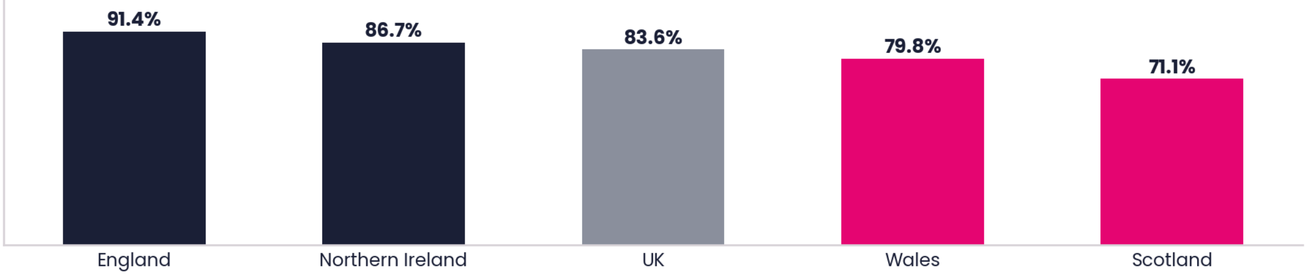
08 Mobile: the 5G *reality check*

The Spring update covers the airwaves as well as the trenches, and it shows a mobile market with one striking feature: the gap between the best and worst 5G network is now eighteen points.



5G by operator, outdoor premises coverage, January 2026

Source: Ofcom mobile open data, January 2026, high confidence threshold, recomputed by BroadbandSwitch.uk. Unrounded: EE 94.3%, O2 86.2%, Vodafone 77.3%, Three 75.9%; standalone O2 85.1%, EE 72.8%, Vodafone 49.5%. Three had not deployed standalone 5G at the snapshot date. Ref [13].



4G from all four operators, share of landmass, January 2026

Source: Ofcom mobile open data, January 2026, geographic coverage, recomputed by BroadbandSwitch.uk. Unrounded UK figure 83.6%. Ref [13].

On 4G, the Shared Rural Network is visibly delivering: geographic coverage from **all four operators** reached 84% of UK landmass, up three points in six months, with England at 91% and Scotland, the biggest beneficiary of the remaining build, at 71%. From at least one operator, 4G covers 96% of the landmass and 99.7% of premises indoors.

On 5G, coverage from at least one network now reaches 98% of premises outdoors, and combined all operator coverage jumped from 47% to 64% in a year. The operator spread matters more than the average: EE at 94% and Three at 76% are meaningfully different products in rural Britain.

IN SHORT · 5G STANDALONE

Standalone 5G runs end to end on 5G equipment instead of leaning on the 4G core, unlocking the technology's full speed, capacity and responsiveness. It is live on O2, EE and Vodafone; Three had not launched it at the January snapshot.

Why does this belong in a broadband report? Because a strong outdoor 5G signal now powers a very credible home connection, and for the thin coverage areas of Sections 4 and 7, a 5G router is increasingly the first alternative worth pricing before satellite. One reading note: outdoor coverage describes the signal at the building, and indoor experience depends on walls and windows, so treat these figures as upper bounds.

84%
of UK landmass has 4G from all four operators, up three points

98%
of premises get outdoor 5G from at least one network

49 to 85%
the standalone 5G range across the three operators that offer it

09 The road to *2029*

Alongside the coverage census, Ofcom published what every operator says it will build next. If those plans land, the 82% country becomes the 92% country within three years. Three forces will decide whether they do.

The projection. Ofcom's Planned Network Deployments 2026 analysis aggregates announced build plans to around 28.1 million homes with full fibre, 92%, by January 2029, plus several thousand additional fixed wireless masts. Treat it as a scenario, not a promise: it is the regulator's most optimistic reading of operator plans, assuming funding holds and every announced build survives contact with reality.

Force one: consolidation. The altnet sector that drove much of the record build is merging. The Competition and Markets Authority is examining nexfibre's proposed acquisition of Substantial Group, the parent of Netomnia, YouFibre and Brsk, with a statutory deadline of 15 December 2026 that can be extended. For a household the trade off is real: fewer networks can mean less price competition, but bigger ones are likelier to keep building. Our **Great Consolidation report** put 68% odds on three by the mid 2030s.

Force two: the subsidised tail. Project Gigabit is the public programme for the premises no commercial build will reach. Its July 2026 tracker showed 287,510 of 838,490 contracted premises built, 34%, with delivery accelerating month on month, and the nationwide target now set for 2032. The bottom five councils of Section 6 are precisely where this programme earns its keep.

Force three: the dial tone deadline. The analogue phone network switches off on 31 January 2027, pushing millions of remaining copper households to make an active decision about their line for the first time in years. Every one of those decisions is a natural moment to adopt fibre, and the correlation between the two datasets is direct: every analogue line retired is a broadband decision brought forward, which is why we expect the take-up line of Section 5 to keep steepening through 2027. Our **Last Dial Tone report** (broadbandswitch.uk/reports/the-last-dial-tone/) covers who needs to prepare and how.

The build machine is still running: 92% by January 2029 if announced plans deliver.

92%
projected full fibre by January 2029 if announced plans deliver (Ofcom)

15 Dec 2026
statutory deadline for the CMA's fibre merger decision

31 Jan 2027
the analogue phone network switches off for good

10 What to do *about it*

A coverage report is only useful if it changes a decision. Here is where the January 2026 data points, for three different readers.

If you are a household. Check what your address can get now, because the odds it changed recently have never been higher: 1.2 million homes gained full fibre in six months. Find your contract end date, which your provider must tell you, and use One Touch Switch, which passed three million completed moves by June 2026, since your new provider handles the whole change including the cancellation. If anyone in the household receives Universal Credit or Pension Credit, check a social tariff first: our **Loyalty Penalty report** found nine in ten eligible households missing roughly £200 a year. Sanity check any shortlist against the latest **Ofcom complaints league**, and test what you actually receive with our free speed test before and after any change.

If you run a small business. The coverage arriving on residential streets is arriving at business parks too, and the 47% take-up problem is, if anything, worse among micro firms. Check whether you are on the right contract type for your protections as well as your price, and put 31 January 2027 in the diary if anything in the building still runs on an analogue line: card terminals, alarms and lift phones included.

If you are a policymaker or provider. The build side of this dataset needs little help. The adoption side does. Take-up at 47%, a 59 point spread between the best and worst connecting councils, and nine in ten social tariff eligible households unaware of the discount all point the same way: the binding constraint on the UK's digital dividend is now awareness, not availability. Coverage targets got the country to 82%. Only adoption metrics will get value from it.

THE UPGRADED STREET

Out of contract on part fibre while full fibre passed the house last year. A postcode check plus a contract check typically recovers speed and money at once, and switching is the new provider's job under One Touch Switch.

THE RURAL HOLDOUT

In the 34% of rural homes without full fibre. Price fixed wireless and a 5G router before satellite, check the Project Gigabit map for a build date, and remember the USO right if nothing decent exists at all.

THE MICRO FIRM

Trading on a residential line that predates the fibre build outside. Reprice both contract types, and audit every analogue dependent device in the building against the January 2027 switch off.

TAKE ACTION

One postcode. Two minutes. Every option we compare, at your address.

Compare at your address → **Free speed test →**

QUICK ANSWERS

Eight common questions

1 Can I actually get full fibre?

82% of homes can, as of January 2026, and coverage has grown since. The only reliable answer is a live check against your own postcode, because availability changes street by street.

2 What counts as full fibre?

Fibre optic cable all the way into your home. Part fibre products that finish over copper or coaxial cable do not count, however they are branded, and Section 1's diagram shows the difference.

3 Why do I see both 82% and 81% reported?

Both are correct. 82% is the share of homes; 81% is the share of all premises including businesses. Always check the base of any coverage claim.

4 Is full fibre more expensive?

Often it is not. Entry full fibre deals frequently undercut the out of contract price of older copper packages, particularly from the challenger networks hunting their first customers.

5 What if I cannot get a decent connection at all?

You are one of roughly 39,000 premises. Realistic routes are fixed wireless, 4G or 5G home broadband and satellite, plus the legal USO right to request a connection from BT or KCOM.

6 Will switching cut off my internet?

Under One Touch Switch you contact only the new provider, which manages the whole move and the cancellation, with compensation rules if things go wrong.

7 Does this affect my landline?

Indirectly, yes. The analogue network switches off on 31 January 2027, and most switches now move calls to a digital voice service automatically. Tell your provider first if you rely on a telecare device.

8 Where does the data come from?

Ofcom's Connected Nations update Spring 2026 and its raw open data files, recomputed by us, with every figure graded in the appendix and listed in the references.

9 How do I find my contract end date?

Ask your provider or check your online account. Providers must send end of contract notifications and an annual best tariff reminder, so the date is never a secret.

10 What speed do I actually need?

Lighter households need less than they think, while busy homes with streaming, gaming and video calls benefit from 100 Mbit/s or more. Test what you get today with our free speed test, then buy for how you live.

11 What is a social tariff, and am I eligible?

A discounted package for households on Universal Credit, Pension Credit and similar support, typically saving around £200 a year. Around nine in ten eligible households are missing it, so check before any switch.

12 Do I need an engineer visit for full fibre?

Usually yes, the first time: an engineer fits a small optical box where the fibre enters your home, and your provider supplies the router. After that, most switches happen remotely.

13 Will I keep my phone number?

Normally yes. Calls move to a digital voice service running over your broadband and your number ports across. Tell your provider first if anyone in the household relies on a telecare device.

14 What about broadband when I move home?

Check what the new address can get before you commit to it, because that decides your options from day one. Moving is a new order rather than a switch, so start it two to three weeks ahead.

15 Is 5G home broadband any good?

Where outdoor 5G is strong it is a genuinely credible option, often working within minutes of plugging in. Coverage figures are upper bounds indoors, so trial a router on a returns friendly deal first.

16 Why is my speed lower than advertised?

Advertised speeds describe the line at peak time averages, and indoor Wi-Fi is usually the real bottleneck. Test on a wired connection if you can, and at different times, before blaming the line.

REFERENCE

The Acronym *Decoder*

The standard BroadbandSwitch.uk decoder: every abbreviation and term of art in this report, translated once and properly.

Altnet
Alternative network. A challenger provider building its own full fibre in competition with Openreach and Virgin Media O2

BDUK
Building Digital UK. The government body delivering Project Gigabit subsidies

CMA
Competition and Markets Authority. The regulator reviewing the fibre mergers of Section 9

Decent broadband
The legal floor. At least 10 Mbit/s download and 1 Mbit/s upload

FTTC
Fibre To The Cabinet. Fibre to the street cabinet, copper for the last stretch home

FTTP
Fibre To The Premises. Full fibre, all the way into the building

FWA
Fixed Wireless Access. Home broadband delivered over the air from a mast to an antenna

Gigabit capable
1 Gbit/s or faster. Full fibre plus upgraded cable networks

HFC
Hybrid Fibre Coaxial. Cable broadband: fibre deep into the network, coaxial to the home

MNO
Mobile Network Operator. EE, O2, Three and Vodafone run the UK's four networks

ONT
Optical Network Terminal. The small box where the fibre ends inside your home

OTS
One Touch Switch. Change provider by contacting only the new one

Premises passed
Availability. Premises able to order a service, whether or not they have

PSTN
Public Switched Telephone Network. The analogue phone system, off on 31 January 2027

SRN
Shared Rural Network. The joint operator and government programme extending rural 4G

Standalone 5G
5G SA. 5G running end to end without leaning on the 4G core

Superfast
30 Mbit/s or faster. The tier now available to 98% of homes

Take-up
Adoption. The share of premises passed that have an active connection

Ultrafast
100 or 300 Mbit/s+. Ofcom reports both thresholds; this report states which

USO
Universal Service Obligation. The legal right to request a decent connection

WISP
Wireless ISP. A provider delivering decent broadband via fixed wireless

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MISSING A TERM?

The full living glossary, kept current beyond this report's print date, is at broadbandswitch.uk.

How we sourced every figure

Every number in this report names a source and a date, but they do not all carry equal weight, so each key figure sits in one of four grades. Where a claim is our own calculation, we say so plainly rather than dress it as settled fact.

Grade	What it means	Examples in this report
Confirmed	Recomputed by us from Ofcom's raw open data files, or traced to Ofcom's published report	The 82% and 24.9m; the 89% and 27.1m; all nation, rurality, council and mobile figures; the 39,072; the 12.4m connections and 47% take-up (report text)
Corroborated	Consistent across two or more independent sources on different dates	The interim trajectory points for 2024 and January 2025; the Shared Rural Network's rural 4G gains; Project Gigabit delivery
Single-source	Rests on one organisation's statement or reproduction, and is flagged as such	The nation take-up chart, from Ofcom tables as reproduced in trade coverage, with values cross checked in July 2026
Derived	A calculation of ours, shown with its workings so it can be checked	The 13.9 million gap (26.3m passed minus 12.4m connected); the 88 point council spread; the ten to one rural exclusion ratio

CAVEATS WORTH STATING PLAINLY

Coverage figures describe January 2026 and networks have kept building since, so every availability number here is a floor. Headline coverage uses residential premises (homes, base 30,455,777); take-up and the exclusion figures use all premises (base 32,493,694), matching Ofcom's own presentation, and each figure's base is stated where it appears. Availability is not adoption: 82% passed does not mean 82% connected, which is the entire subject of Section 5. The 92% for January 2029 is a projection of announced plans, not achieved coverage. The trajectory chart's 2024 and January 2025 interim points were cross checked in July 2026 against Ofcom's Spring 2025 and Spring 2026 publications and are graded corroborated; the nation take-up chart derives from Ofcom tables as reproduced in trade coverage and keeps a single-source grade. Take-up throughout is measured against premises that can already get full fibre, not against all addresses. Ofcom separately identifies around 7,000 commercial premises that could additionally be eligible under the USO, outside the 39,000 figure. The around 4,000 affordable access figure is Ofcom's estimate and depends on satellite pricing that can change. Mobile coverage uses Ofcom's high confidence signal thresholds; real world experience varies with terrain and buildings. Five councils tie at 96.7% full fibre to one decimal place; we list the first three alphabetically ranked by the unrounded values in our data companion. Comparison site figures were excluded as sources throughout.

WHY GRADE OUR OWN NUMBERS?

Because the fastest way to lose a reader's trust is to present a guess as a fact. Telling you how firm each number is, and showing the sums behind the soft ones, is the discipline that runs through this and every previous report.

REFERENCES

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Analysis dataset: all recomputed figures in this report derive from references [12] and [13]. A machine readable companion is published alongside the web edition of this analysis.

THE LIBRARY

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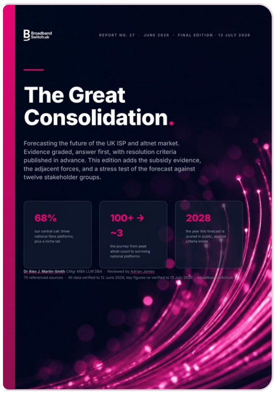

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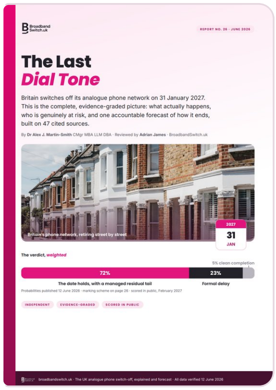

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The UK Broadband Market

AUTHORITY REPORT · 2000 TO 2030 · PDF

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Connected Nations 2025 · Consumer report · April 2026 · The baseline this report updates: what Ofcom's July 2025 data meant for your broadband at home. Read it at **broadbandswitch.uk/reports/connected-nations-2025/**

★ FEATURED IN THE PRESS · AND THE NEXT ONE

Our reports have been covered by ISPreview.co.uk, one of the UK's leading broadband news outlets. Report No. 30 is already in the diary, and every report is announced first at broadbandswitch.uk.

ABOUT

The author, and the *promise*

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Alex is the founder of BroadbandSwitch.uk and the SearchSwitchSave network of UK comparison and digital tools. His work sits at the junction of consumer telecoms, regulation and clear explanation. His doctoral research in organisational capability underpins the analytical method running through this report, and his standing rule for everything the network publishes is the one applied here: every figure dated, every source named, nothing guessed.

Connect: linkedin.com/in/alexmartinsmith · Reviewed by Adrian James, Sales Director and Broadband Editor, BroadbandSwitch.uk. Every figure in this report was checked against its named source by both author and reviewer before publication. Author pages: broadbandswitch.uk/alex-martin-smith · broadbandswitch.uk/adrian-james

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