AUTHORITY REPORT · VOLUME I

VOLUME I · 2026
Wednesday, 27 May 2026

The UK Broadband Market. *2000–2030.*

A three-decade data review of the UK consumer broadband market across twenty metrics, fifteen charts and twelve expansion areas. Live across Openreach, Virgin Media O2, and 100+ altnet networks.

~80%
UK PREMISES FULL-FIBRE READY
September 2025 (ThinkBroadband)

285
MBIT/S AVERAGE MAX UK DOWNLOAD SPEED
Ofcom CN2025 (up 28% on 2024)

19.7M
PREMISES PASSED BY ALTNETS
End-2025 (INCA / Point Topic)

Authored by Dr Alex J. Martin-Smith
Reviewed by Adrian James
Next review within 30 days

SECTION 00 · EXECUTIVE SUMMARY · VOLUME I, 2026

A genuinely good time to be a UK broadband customer.

The story of UK broadband between 2000 and 2026 is one of the most quietly successful infrastructure transformations in recent British history. In 2000 just 25% of UK households had any form of internet connection, almost all of it dial-up running at 0.5 Mbit/s over copper. By the end of 2025, 96% of households have an internet connection, the typical fixed line delivers a measured median of 69 Mbit/s and an "average maximum" of 285 Mbit/s, and Full Fibre to the Premises (FTTP) reaches 80% of UK addresses with a clear, costed path to 99% by 2032. Average UK bills have fallen by approximately 6% in real terms in the year to September 2025 even as nominal prices have risen modestly.

This report consolidates every consumer-facing metric that matters across the period. Twenty primary metrics, fifteen charts, twelve expansion areas, and more than fifty cited sources. It is the reference document for anyone wanting to understand where the UK consumer broadband market has come from, where it is now, and where it is going between 2026 and 2030.

Five things worth knowing right away

1. Speed inflation is real, but methodology breaks make the headline 6 to 285 Mbit/s climb misleading.

Ofcom moved from a "measured mean" methodology (2008-2018) to a "measured median" methodology (2019-2022) and then to a wholly new "average maximum download speed" methodology in 2023. The genuine measured median in March 2023 was 69.4 Mbit/s. The 285 Mbit/s figure in 2025 reflects the headline speed of packages taken, not what is being delivered in tests.

2. Coverage is converging on success, but the gap between premises passed and live connections is the new battleground.

FTTP availability hit 80% in September 2025 and gigabit-capable coverage 88.8%, ahead of the Government's 85% by end-2025 target. But Openreach reports just 38.27% FTTP take-up at 31 March 2026, with 8.77 million live FTTP customers against a 22.92 million footprint. Altnets average 18% take-up. The build is mostly done; the connecting-up is just beginning.

3. Altnets have moved from "interesting" to "structural" in one parliament.

Premises passed by independent networks grew from 8.2 million end-2022 to 19.7 million end-2025, with live connections at approximately 3.5 million. CityFibre alone covers 4.7 million premises; Netomnia/YouFibre, Community Fibre, and Hyperoptic each pass between 1.3 and 2.8 million. Consolidation has begun.

4. Prices are falling in real terms but bills are rising in cash terms - both statements are true at the same time.

Real-terms broadband prices fell approximately 6% in the year to September 2025 across speed tiers. Nominal pounds-and-pence bills rose £3 to £4 per month for most major providers in April 2026. These two things are not contradictions. Inflation is the difference between the two views.

5. Retail competition has gone from four-player to genuine multi-player.

As of H2 2025, share runs BT Group (8.22m, 28.5%) > Sky (5.77m, 20.0%) > Virgin Media O2 (5.45m, 18.9%) > TalkTalk (3.20m, 11.1%) > Vodafone (1.83m, 6.3%), with altnets collectively around 12% and rising. Vodafone and Three merged on 31 May 2025 (£16.5bn) creating VodafoneThree.

SECTION 00 · EXECUTIVE SUMMARY CONTINUED

What this report means for UK households.

For the ordinary UK household, four practical conclusions emerge from the data in this report. None of them is complicated. All of them have meaningful pounds-and-pence consequences.

If FTTP is available on your street, switch this contract cycle.
Real-terms FTTP entry prices now start in the high teens £ per month on altnets and the low £20s on national providers. Switching from a copper or FTTC plan typically saves £100 to £300 a year and unlocks symmetric uploads, lower latency, and meaningful future-proofing. Check availability via your postcode.

If you receive benefits, claim a social tariff.
Just 8.6% of eligible households were on a social tariff in June 2025, a remarkable gap. Ofcom found 70% of eligible households did not know social tariffs existed. Universal Credit, Pension Credit, ESA, JSA, and Income Support recipients can typically take broadband at £12.50 to £20 per month with no setup fees and 30-day notice periods.

If you have a copper landline, plan PSTN migration during 2026.
The Public Switched Telephone Network is being switched off entirely by 31 January 2027. As of February 2026, 1,281 Openreach exchanges covering 12.5 million premises were under active stop-sell. Telecare and monitored-alarm users should engage their provider via the Prove Telecare process now, not next year.

If you have not switched in 18 months, you are paying an out-of-contract premium.
Ofcom's 2025/2026 Pricing and Consumer Engagement Report puts the average out-of-contract dual-play premium at 18%. With One Touch Switch live since 12 September 2024 and over 1.6 million switches completed in its first 12 months, the friction that used to make switching annoying has effectively disappeared.

The 2026 to 2030 trajectory is broadly positive. Coverage gets to near-universal; take-up rises from the high 30s to the mid 60s percentage; altnet consolidation produces five to ten strong regional groupings; prices fall further in real terms as wholesale competition under TAR26 takes effect; and consumer protection improves under Ofcom's pounds-and-pence regime, automatic compensation rules, and continued social tariff expansion. The risks are mostly execution risks: PSTN migration of vulnerable telecare users, altnet consolidation done badly, and the rural last 1% where economic build cost still exceeds the £3,400 USO cap.

I have tried to make this report useful both to consumers wanting to understand their own choices and to industry and policy readers who need a single sourced reference document. The data tables and CSV files behind every chart are available alongside this PDF for anyone who wants to interrogate the underlying numbers.

Dr Alex J. Martin-Smith
Founder and Lead Editor, BroadbandSwitch.uk
27 May 2026 · Compiled in Great Britain and the Isle of Man

SECTION 01 · INSIDE THIS REPORT

Contents.

A six-part report on the UK consumer broadband market 2000 to 2030. Each metric opens with a Quick Answer for scan-readers and includes a So What callout under every chart explaining the consumer implications in plain English.

SECTION 02 · METHODOLOGY

How this report was put together.

QUICK ANSWER

This report consolidates publicly available data on the UK consumer broadband market 2000 to 2026 and forecasts to 2030 across 20 metrics. Each datapoint is cited at row level in the accompanying CSV files. Sources are presented in APA 7th edition format. Where Ofcom and an independent source (typically ThinkBroadband) disagree, both figures are presented side by side.

Primary source hierarchy

In order of authority, this report draws on the following sources, with cross-checking where two credible sources disagree on a single number:

- **Ofcom** - Communications Market Reports (2004-2024); Connected Nations Reports (2016-2025); UK Home Broadband Performance reports (2009-2023); Pricing Trends 2024 and Pricing and Consumer Engagement Report 2025/2026; Quality of Service reports.
- **ThinkBroadband** - State of Broadband Reports and live Openreach FTTP coverage tracker.
- **ISPreview UK** - News archive (2008 to date) for milestone reporting and operator disclosures.
- **BT Group plc** - Annual and quarterly results; six-monthly USO progress reports.
- **Office for National Statistics** - Internet Access: Households and Individuals (1998-2020).
- **INCA / Point Topic** - State of the Altnets annual sector reports (2022-2026).
- **Department for Science, Innovation and Technology (DSIT)** - Project Gigabit publications.
- **Building Digital UK (BDUK)** - Quarterly progress reports.
- **House of Commons Library** - Research briefings on USO, gigabit programme, and PSTN switch-off.
- **TOTSCo** - One Touch Switch operational data and milestone updates.

Conventions and definitions

All currency values are British pounds (£). Real-terms prices are CPI-adjusted to September 2024 prices unless otherwise stated. Speeds are megabits per second (Mbit/s) or gigabits per second (Gbit/s). Forecast datapoints are flagged "BroadbandSwitch.uk forecast" with underlying assumptions documented in the source CSV files. Where the same metric is reported with different numbers by Ofcom and an independent source, both are shown to make methodological differences visible.

A full APA 7th edition reference list appears at the end of this document. Twenty CSV files containing the underlying year-by-year data are available alongside this PDF.

SECTION 03 · PART 1 · THE 20 METRICS

The UK broadband market in twenty numbers.

Twenty consumer-facing metrics structured to be useful to households, journalists, policy researchers, and industry observers alike. Every chart is followed by a "So What?" callout translating the data into plain English consumer terms.

80%	**285**	**38%**
UK PREMISES FULL-FIBRE COVERAGE	**MBIT/S AVERAGE MAX DOWNLOAD SPEED**	**OPENREACH FTTP TAKE-UP RATE**
September 2025 (ThinkBroadband)	*Ofcom CN2025 (up 28% YoY)*	*At 31 March 2026 (BT Group FY26)*

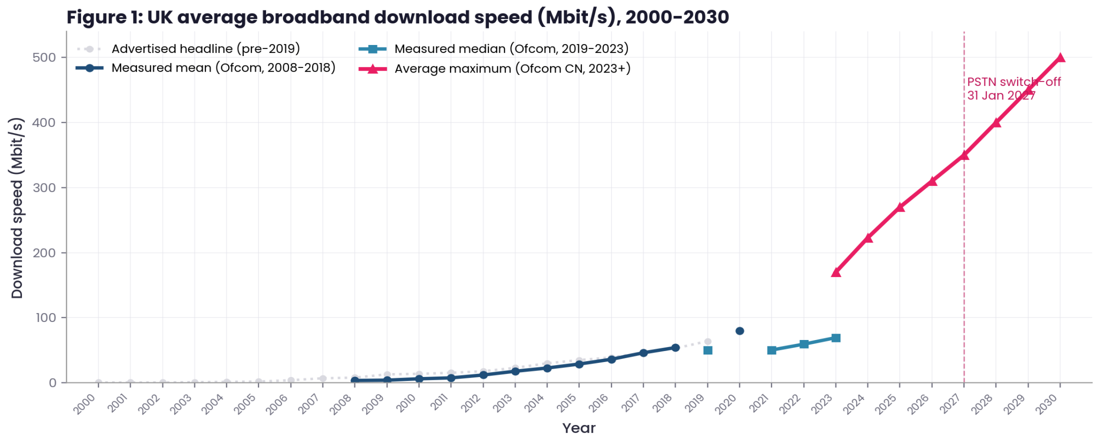
SECTION METRIC 01 · SPEED · DOWNLOAD

Average UK broadband download speed.

QUICK ANSWER

UK average broadband download speed has risen from 0.5 Mbit/s in 2000 to an "average maximum" of 285 Mbit/s in 2025, a factor of more than 500. Three different Ofcom methodologies sit behind that number. The genuine measured median in March 2023 was 69.4 Mbit/s; the headline 285 Mbit/s reflects what packages people buy, not what speedtests deliver.

The headline UK broadband download speed has risen from 0.5 Mbit/s in 2000 to a reported "average maximum" of 285 Mbit/s in 2025. Three different measurement methodologies sit underneath that climb. Ofcom's SamKnows-based UK Home Broadband Performance series ran from 2008 to 2018 on a "measured mean" basis, moved to a "measured median" basis between 2019 and 2023, and was then discontinued when Connected Nations 2023 introduced a new "average maximum download speed" methodology derived from operator-reported headline package speeds rather than measured throughput. Figure 1 plots all three series with the methodology breaks clearly marked.



Source: Ofcom Communications Market Report series; UK Home Broadband Performance series 2009-2023; Connected Nations 2024 and 2025. Note methodology shifts in 2019 (mean to median) and 2023 (introduction of "average maximum" methodology).

Figure 1: UK average broadband download speed (Mbit/s), 2000-2030. Source: Ofcom CMR series; UK Home Broadband Performance 2009-2023; Connected Nations 2024 and 2025.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

For most UK households today, the speed that actually arrives at the router is somewhere between 50 and 300 Mbit/s depending on the package bought. The 285 Mbit/s headline figure does not mean every household gets that speed. It means that on average, the packages people sign up to are advertised at that level. If you are unsure what you actually get, run a free test at UKSpeedTest.co.uk.

Key inflection points in the speed series

Year	Event	Speed impact
2010	BT Infinity (FTTC) launch; Virgin Media DOCSIS 3.0 50 Mbit/s service	Step-change from sub-7 Mbit/s ADSL
2014	Advertised speeds reach 30 Mbit/s with BDUK Superfast rollout	Mass-market 30 Mbit/s is the norm
2017	Measured speeds approach advertised speeds	FTTC take-up scales
2018	ASA rule requires "median actual" speed in advertising	Honesty in headlines
2020	COVID-19 lockdowns drive measured mean to 80.2 Mbit/s; FTTP doubles to 14%	Pandemic accelerates demand
2023	Methodology shift to "average maximum" in CN 2023	69 measured -> 223 reported
2025	Ofcom CN2025 reports 285 Mbit/s average maximum	Up 28% YoY

SECTION METRIC 02 · SPEED · UPLOAD

Average UK broadband upload speed.

QUICK ANSWER

Upload speed is the quietly transformative metric. Pre-2017 it was a near-irrelevant 0.5 to 5 Mbit/s, dominated by asymmetric ADSL and cable. Ofcom's measured median rose from 7.2 Mbit/s in 2018 to 18.0 Mbit/s in March 2023. Symmetric FTTP packages have now pushed typical uploads to 100, 500 or 1,000 Mbit/s on full fibre lines.

Upload speed is the quietly transformative metric of UK broadband. Pre-2017 it was a near-irrelevant 0.5 to 5 Mbit/s number, dominated by asymmetric ADSL and cable technologies that prioritised downloads. The median upload speed measured by Ofcom rose from 7.2 Mbit/s in 2018 to 18.0 Mbit/s in March 2023, the last measured value before the methodology change. The arrival of symmetric FTTP packages from Hyperoptic, CityFibre, Community Fibre, YouFibre, and increasingly Openreach has now driven a step-change: a typical FTTP customer takes a symmetric 100, 500, or 1,000 Mbit/s package where the upload speed matches the download. Upload speed matters disproportionately to home workers, video creators, and cloud users; the COVID-19 period pushed it from niche to mainstream.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

If you work from home, host video calls, or upload large files (creators, photographers, anyone using cloud backup), upload speed is often more important than download speed for the experience you actually have. A 150 Mbit/s symmetric FTTP plan on an altnet typically beats a 500 Mbit/s asymmetric plan with 50 Mbit/s upload for real-world use. Check the upload number, not just the download.

Typical upload speeds by technology

Technology	Typical upload	Symmetric?
ADSL (copper)	0.5 to 1.5 Mbit/s	No
ADSL2+	1 to 2.5 Mbit/s	No
FTTC (Openreach)	10 to 20 Mbit/s	No
Cable (Virgin DOCSIS 3.0)	10 to 36 Mbit/s	No
Cable (Virgin DOCSIS 3.1)	50 to 100 Mbit/s	No
FTTP Openreach (asymmetric)	20 to 220 Mbit/s	No
FTTP altnet (symmetric)	100 to 2,000 Mbit/s	Yes
5G FWA	10 to 100 Mbit/s	No
Starlink	5 to 25 Mbit/s	No

SECTION METRIC 03 · PRICING · NOMINAL VS REAL

Average monthly broadband price.

QUICK ANSWER

Pricing is the one metric where the gap between "headline" and "real terms" matters most. Nominal pounds-and-pence bills have risen modestly each year. But real-terms prices (adjusted for inflation) have fallen approximately 6% in the year to September 2025 across speed tiers. Both statements are true at the same time. The difference is general economy-wide inflation.

Pricing is the metric where the gap between "headline" and "real terms" matters most. In nominal pounds (the actual cash that leaves your bank account), the average UK residential broadband bill has risen from £13.63 in 2007 to £32.50 in 2024. But CPI-adjusted to September 2024 prices, broadband at sub-30 Mbit/s has fallen from £36.56 in 2019 to £26.27 in 2024 and to an estimated £24.95 in 2025 (Ofcom, 2026). Higher speed tiers have fallen even faster in real terms.

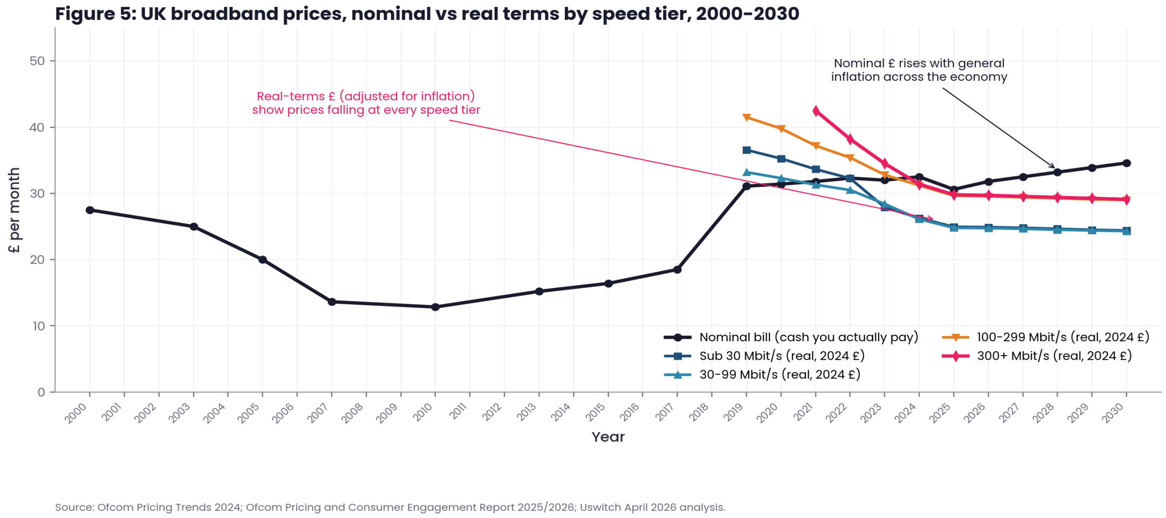


Figure 5: UK broadband prices, nominal vs real terms by speed tier, 2000-2030. Source: Ofcom Pricing Trends 2024; Ofcom Pricing and Consumer Engagement Report 2025/2026; Uswitch April 2026 analysis.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

Both lines are correct. The black line (nominal) shows what you actually pay in cash each month - that is going up by £3-4 per year, in line with general inflation across the whole economy. The coloured lines show "real-terms" prices, which strip out inflation and let you compare like-for-like with earlier years. In real-terms, broadband is cheaper than it was five years ago at every speed tier. Your bill is going up in cash, but your purchasing power against everything else is improving. Bottom line: broadband is one of the few household bills genuinely getting cheaper relative to your income.

Why does this happen? The plain English explanation

When the prices of everything in the economy rise by, say, 3% in a year (general inflation), your wages typically rise by a similar amount, and so do your other bills. If your broadband bill rises by only 2% in the same year, then in real terms - meaning compared with everything else - it has become cheaper, even though the cash number on your bank statement is bigger.

This is exactly what has happened in UK broadband from 2019 onwards. Nominal bills have crept up £1 to £4 per year. General CPI inflation has been higher than that in most years (notably 9% to 11% in 2022-2023). Net effect: real-terms broadband prices have fallen. Ofcom's Pricing and Consumer Engagement Report 2025/2026 calculates a 6% real-terms drop across speed tiers in the year to September 2025.

Two structural events shape the price trajectory from 2025. First, Ofcom's ban on inflation-linked mid-contract price rises took effect on 17 January 2025 (Ofcom, 2024). Providers must now express any in-contract price increases in pounds and pence at the point of sale. This has anchored typical annual rises at £3.00 to £4.00 for broadband and £1.50 to £1.80 for mobile. Second, social tariff availability has expanded substantially: by June 2025, 532,000 UK households were taking social broadband and mobile tariffs (Ofcom, 2026), up from 220,000 in February 2023.

Pricing benchmarks at January 2026

Speed tier	Real-terms £/month (2024 prices)	YoY change (real terms)	Typical advertised new-customer price
Sub 30 Mbit/s	£24.95	-5%	£21 to £28
30 to 99 Mbit/s	£24.80	-5%	£22 to £29
100 to 299 Mbit/s	£29.65	-5%	£23 to £32
300+ Mbit/s	£29.80	-5%	£25 to £45
Whole-market nominal avg	£30.60	-6% real	n/a

Source: Ofcom Pricing and Consumer Engagement Report 2025/2026.

SECTION METRIC 04 · VOLUME · SUBSCRIPTIONS

Total UK broadband subscriptions.

QUICK ANSWER

The UK reached 28.94 million total fixed broadband connections by Q3 2025 (Point Topic), made up of approximately 25 million residential and 3.94 million business connections. The market is now mature: total connections grew only 1.4 million from 27.5 million in 2020 to 28.94 million in Q3 2025, even as FTTP coverage climbed from 14% to 80%.

The UK reached 28.94 million total fixed broadband connections by Q3 2025 (Point Topic, 2025), made up of approximately 25 million residential and 3.94 million business connections. The growth curve from 2000 (40,000 connections) through 2003 (2 million), 2007 (15.6 million), and 2010 (19.3 million) is well-documented in successive Ofcom Communications Market Reports.

What is notable about the 2020 to 2025 period is that subscription growth has decoupled from coverage growth. Total connections rose only 1.4 million from 27.5 million (2020) to 28.94 million (Q3 2025), even as FTTP availability climbed from 14% to 80%. This is the textbook signal of a mature market. Future growth will come almost entirely from second-line connections (FWA backup, multi-property households), demographic increase, and small-business take-up rather than first-time household connections.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

Almost every UK household that wants broadband already has it. The market is no longer growing by adding new customers; it is growing by upgrading existing ones to faster, better, cheaper packages. That is unambiguously good news for switchers: providers compete harder for your custom when they cannot get new customers from anywhere else.

SECTION METRIC 05 · HOUSEHOLDS · INTERNET ACCESS

UK household internet penetration.

QUICK ANSWER

The proportion of UK households with internet access rose from 9% in 1998 to 96% in 2020, when the ONS series was discontinued. IBISWorld estimates 2024-26 at approximately 97 to 98%. The remaining gap is structural rather than technical: a small proportion of older or digitally excluded households who choose not to subscribe.

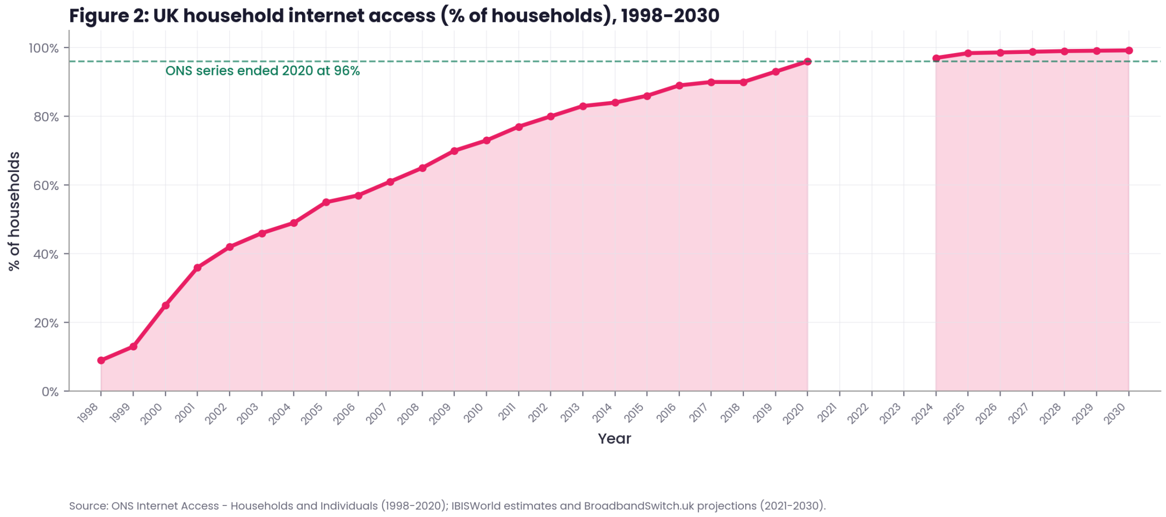


Figure 2: UK household internet access (% of households), 1998-2030. Source: ONS Internet Access - Households and Individuals (1998-2020); IBISWorld estimates and BroadbandSwitch.uk projections (2021-2030).

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

The UK is now an essentially-connected nation. The remaining 2 to 4% of households without internet are mostly older people who have actively chosen not to take it. If you are one of the few households without internet, social tariffs starting at £12.50 a month, plus subsidised devices through schemes like Citizens Online, mean cost is rarely the real barrier any more.

The ONS Internet Access series, which ran from 1998 to 2020, is the canonical reference for UK household internet penetration. It rose from 9% in 1998 to 96% in 2020, when the series was discontinued. IBISWorld estimates 2024 at approximately 97% and 2025-26 at 98.4%.

The disappearance of the ONS series in 2020 left a small data gap that has been filled imperfectly by Ofcom's Technology Tracker (slightly different methodology, broader media-consumption focus) and by IBISWorld estimates. For research consistency, all comparisons after 2020 in this report use IBISWorld unless otherwise specified.

SECTION METRIC 06 · COVERAGE · FULL FIBRE

FTTP (Full Fibre) coverage.

QUICK ANSWER

FTTP coverage hit 80% of UK premises by September 2025 per ThinkBroadband, or 78% per Ofcom Connected Nations 2025. Openreach alone passes 22.92 million premises at 31 March 2026; altnets pass 19.7 million; some premises are reached by both (overbuild), so the unique UK FTTP-passed figure is around 80%, not the sum.

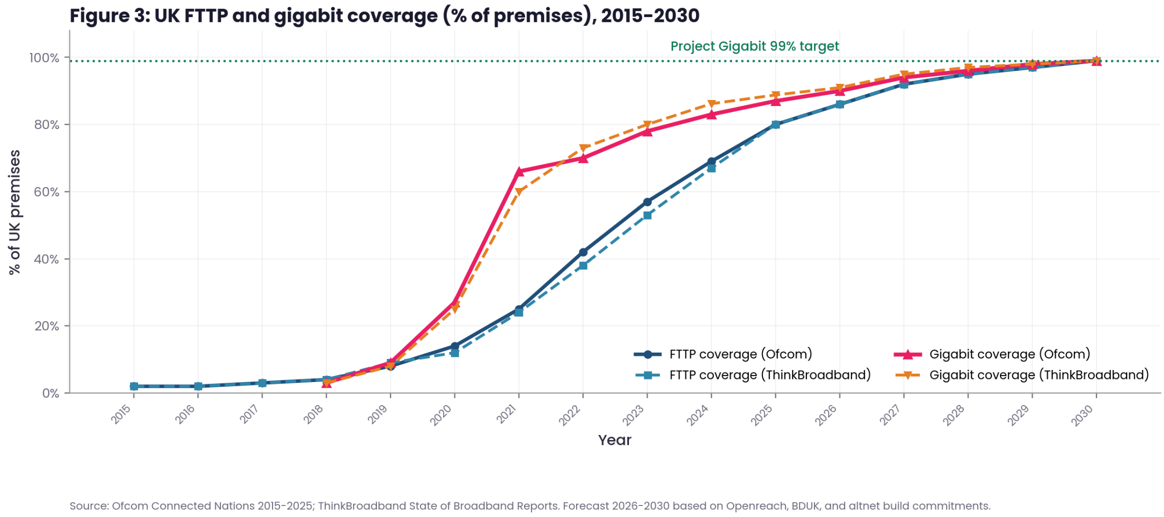


Figure 3: UK FTTP and gigabit coverage (% of premises), 2015-2030. Source: Ofcom Connected Nations 2015-2025; ThinkBroadband State of Broadband Reports.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

If you live in a town or city, FTTP is almost certainly already at your address. If you live in a village or remote area, the build is still coming but Project Gigabit has it scheduled. Either way, the question is no longer "will I get full fibre?" but "when will I switch to it?". Run a postcode check at broadbandswitch.uk to find out exactly what is live on your street today.

FTTP coverage is the metric where the UK has executed most decisively since 2018. From a 2017 base of 3% (around 900,000 premises), Openreach's Fibre First programme, Virgin Media's FTTP build through nexfibre, and the rise of altnets pushed the total to 80% by September 2025 per ThinkBroadband. Openreach's own footprint stood at 22.921 million premises at 31 March 2026 (BT Group FY26 results), with altnets contributing 19.7 million premises (INCA & Point Topic, 2026). Some premises are counted by multiple builders (overbuild), so the unique UK FTTP-passed figure is around 80%, not the sum.

FTTP coverage: Ofcom vs ThinkBroadband

There is a persistent 3 to 5 percentage point gap between Ofcom's operator-reported FTTP coverage and ThinkBroadband's independent address-level model. Both are credible. Ofcom's figure relies on operator-reported counts; ThinkBroadband often catches Ready-For-Service status before Ofcom's data refresh. The take-up gap matters more than the coverage gap; the dedicated Take-up gap analysis section covers it in detail.

SECTION METRIC 07 · COVERAGE · GIGABIT

Gigabit-capable broadband coverage.

QUICK ANSWER

Gigabit-capable coverage was reported at 87% by Ofcom (CN2025) and 88.8% by ThinkBroadband (September 2025). This exceeded the Government's 85% by end-2025 target, met in late 2024. The constituent technologies are Virgin Media O2 DOCSIS 3.1 (around 14 million premises since December 2021), Openreach FTTP, and altnet FTTP.

Gigabit-capable coverage was reported at 87% by Ofcom (CN2025) and 88.8% by ThinkBroadband (State of Broadband September 2025). This comfortably exceeded the Government's 85% by end-2025 target, met in late 2024 per ThinkBroadband. The constituent technologies are Virgin Media O2 DOCSIS 3.1 (around 14 million premises gigabit-capable since December 2021), Openreach FTTP, and altnet FTTP.

The path from 88.8% to the Project Gigabit 99% target is now largely a rural and last-mile challenge. The Government in late 2025 revised the original 2030 nationwide gigabit target to 2032 in DSIT planning (ISPreview, 2026), reflecting the difficulty of building economically to the final 1 to 2% of premises.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

Almost any UK household in a town or suburb can today order a gigabit (1,000 Mbit/s) broadband plan if they want one. Whether you actually need a gigabit is a different question - very few households do. But the existence of gigabit availability means lower-tier packages (100, 300, 500 Mbit/s) are now extremely competitive on price because providers are using the speed range, not just the top of it, to compete.

Government target slippage

Year of commitment	Headline target	Delivery year
2019 (Conservative manifesto)	Full Fibre to every UK home by 2025	Revised
2021 (Project Gigabit launch)	85% gigabit by end 2025	Met late 2024
2021	99% gigabit by 2030	Revised to 2032
2025	99% gigabit by 2032	Current live commitment

SECTION METRIC 08 · COVERAGE · SUPERFAST

Superfast broadband (30 Mbit/s and above).

QUICK ANSWER

Superfast broadband, defined as service at 30 Mbit/s and above, is now effectively universal at 98% UK coverage (Ofcom CN2024). The UK passed the 90% threshold in April 2016 and 95% in early 2018. For consumers and small businesses, "superfast" is now a baseline rather than a premium product.

Superfast broadband, defined as service at 30 Mbit/s and above, is now effectively universal at 98% UK coverage (Ofcom CN2024). The UK passed the 90% threshold in April 2016 (ThinkBroadband, 2016) and the 95% threshold in early 2018, with the BDUK Superfast Broadband Programme contributing meaningfully to rural areas where commercial deployment would otherwise have stopped at around 65 to 70%.

For consumers and small businesses, "superfast" is now a baseline rather than a premium product. The forward-looking question is the speed at which the floor moves up. The European Union has begun proposing 100 Mbit/s as a future minimum benchmark. The UK's USO sits at 10 Mbit/s and is unlikely to be raised before the next regulatory cycle.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

If anyone tries to sell you "superfast broadband" as a premium feature, walk away. Superfast is now the floor, not the ceiling. The interesting differentiation today is ultrafast (100 Mbit/s+) and gigabit, plus things that are not about speed at all: symmetric uploads, no mid-contract price rises, social tariffs, and quality of customer service.

SECTION METRIC 09 · COVERAGE · ULTRAFAST

Ultrafast broadband (100 Mbit/s and above).

QUICK ANSWER

Ultrafast coverage reached 84% in 2024 (Ofcom) and 88% in 2025, driven by Virgin Media's DOCSIS upgrade and the rapid expansion of FTTP. The 100 Mbit/s threshold is increasingly a low bar: typical advertised FTTP packages now start at 100 to 150 Mbit/s and routinely advertise 500 Mbit/s and 1 Gbit/s.

Ultrafast coverage reached 84% in 2024 (Ofcom, 2024) and 88% in 2025, driven by Virgin Media's cable upgrade and the rapid expansion of FTTP. The 100 Mbit/s threshold is increasingly a low bar: typical advertised FTTP packages now start at 100 to 150 Mbit/s and routinely advertise 500 Mbit/s and 1 Gbit/s. By 2030, on current trajectories, "ultrafast" will simply be "normal" for the majority of UK households.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

Ultrafast (100 Mbit/s+) is comfortably the right speed tier for most family households. Two simultaneous 4K streams need about 50 Mbit/s; add a video call and a few smart devices and 100 Mbit/s is plenty. Anything above 300 Mbit/s is genuinely future-proofing rather than meeting today's needs. Do not over-pay for headroom you will not use this contract cycle.

SECTION METRIC 10 · TECHNOLOGY MIX

UK fixed broadband technology mix.

QUICK ANSWER

The UK has moved through three phases: ADSL-dominated (2000-2010), FTTC-dominated (2010-2022), and now FTTP-dominated (2022 onwards). By 2030, on current trajectories, more than 80% of UK broadband connections will be on FTTP. The PSTN switch-off on 31 January 2027 retires ADSL entirely.

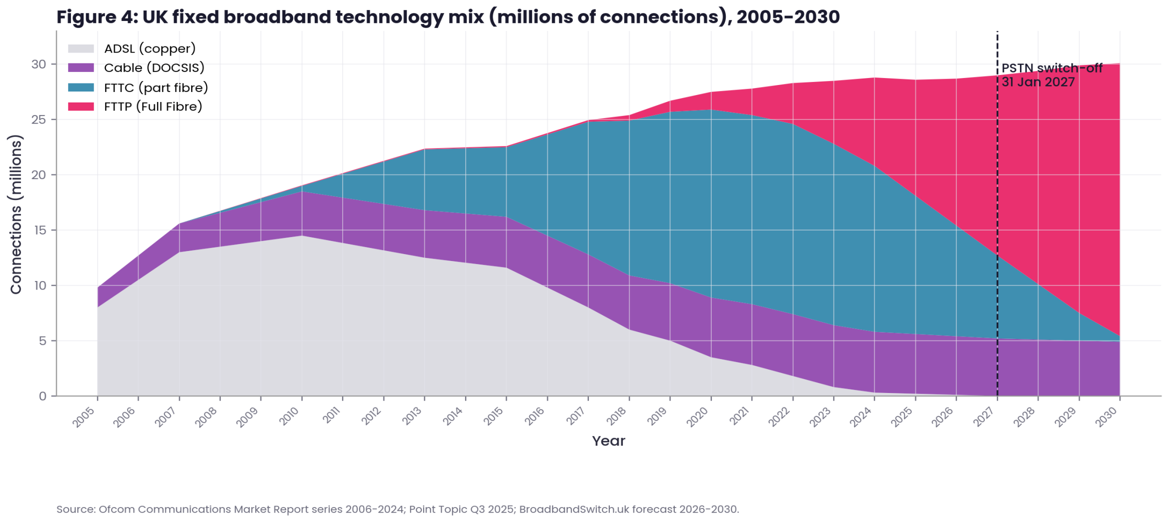


Figure 4: UK fixed broadband technology mix (millions of connections), 2005-2030. Source: Ofcom Communications Market Report series 2006-2024; Point Topic Q3 2025; BroadbandSwitch.uk forecast 2026-2030.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

Most UK households are on FTTC right now (the dark cyan band), but FTTP (the dark blue band) is rapidly overtaking it. If you are still on ADSL or FTTC and full fibre is available at your address, you are almost certainly paying the same money for a worse service than your neighbour who has already switched. The PSTN switch-off on 31 January 2027 means everyone on an old copper line will need to move anyway - better to do it on your own terms now than under deadline pressure in 2026.

The UK fixed broadband technology mix has gone through three distinct phases. Phase 1 (2000-2010) was dominated by ADSL on copper telephone lines, with cable as a strong second. Phase 2 (2010-2022) was the FTTC era, in which Openreach's VDSL2-based "Infinity" product grew to over 17 million connections at peak. Phase 3 (2022 onwards) is the FTTP era, which crossed over ADSL connection numbers in 2023.

The PSTN switch-off on 31 January 2027 will retire ADSL entirely and accelerate FTTC retirement as the underlying copper infrastructure is decommissioned exchange by exchange. By 2030, on current trajectories, more than 80% of UK broadband connections will be on FTTP, with the remainder split between cable (Virgin Media O2), residual FTTC, FWA, and satellite.

SECTION METRIC 11 · MARKET · ISP SHARE

UK ISP market share.

QUICK ANSWER

The UK fixed broadband retail market remains an oligopoly but a notably more contested one than five years ago. BT Group leads with 8.22 million customers (28.5% share), followed by Sky (5.77m, 20.0%), Virgin Media O2 (5.45m, 18.9%), TalkTalk (3.20m, 11.1%) and Vodafone (1.83m, 6.3%). Altnet retail share roughly doubled from 6.7% in 2022 to 12.5% in 2025.

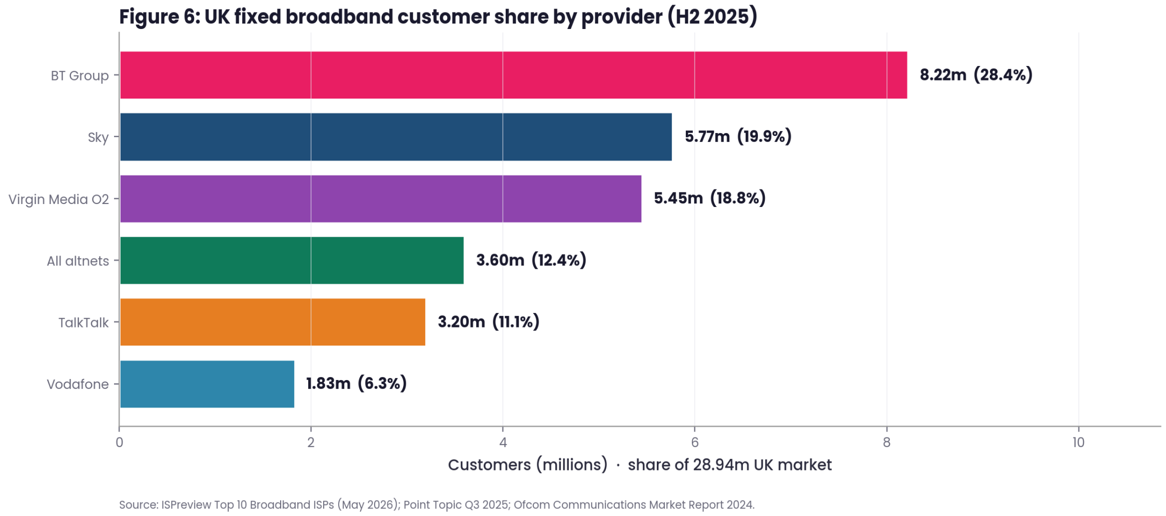


Figure 6: UK fixed broadband customer share by provider (H2 2025). Source: ISPreview Top 10 Broadband ISPs (May 2026); Point Topic Q3 2025; Ofcom Communications Market Report 2024.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

You have more choice in 2026 than at any time in the past 20 years. The top five providers still hold around 85% of the market, but altnets - Community Fibre, Hyperoptic, YouFibre, CityFibre-served retailers - now have a structural 12% share that did not exist five years ago. In many postcodes, especially London and major cities, you can choose between five or six different providers on full fibre. Run a postcode check and compare; loyalty rarely pays in this market.

The UK fixed broadband retail market remains an oligopoly, but a notably more contested one than five years ago. BT Group (BT, EE, Plusnet) leads with 8.22 million broadband customers (28.5% share), followed by Sky (5.77 million, 20.0%), Virgin Media O2 (5.45 million, 18.9%), TalkTalk (3.20 million, 11.1%), and Vodafone UK (1.83 million, 6.3%). Together these top five hold around 85% of the market. The remaining 15% is split among altnets (Community Fibre, Hyperoptic, CityFibre-supplied retailers, YouFibre/Netomnia, Utility Warehouse, Zen, Gigaclear, KCOM, Glide, and others). Altnet retail share has roughly doubled in two years, from approximately 6.7% in 2022 to 12.5% in 2025. TalkTalk has been the consistent loser of share since 2019, falling from 13.8% to 11.1%, while BT Group has held its position broadly steady through aggressive FTTP positioning under the BT, EE, and Plusnet brands.

SECTION METRIC 12 · SWITCHING AND CHURN

Annual UK broadband switching activity.

QUICK ANSWER

One Touch Switch launched 12 September 2024 and is the biggest operational change to UK switching in a decade. By end-2025, over two million customers had used OTS. Annual switching activity rose from approximately 4.0 million switches in 2023 to 5.2 million in 2024 and an estimated 5.8 million in 2025.

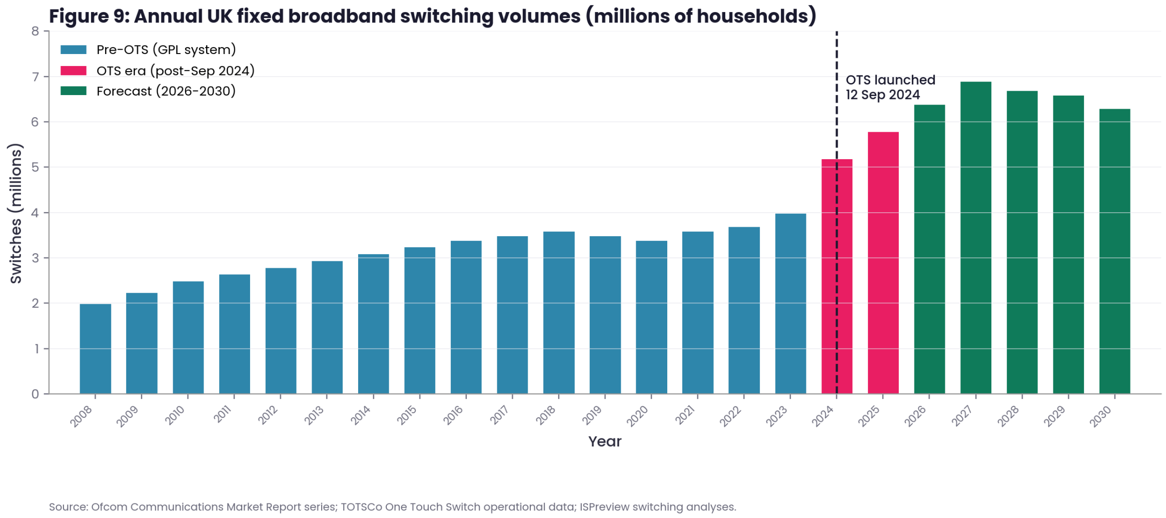


Figure 9: Annual UK fixed broadband switching volumes (millions of households). Source: Ofcom Communications Market Report series; TOTSCo One Touch Switch operational data; ISPreview switching analyses.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

Switching has never been easier than it is right now. You contact only the new provider; they handle the rest, including cancelling your old contract. Most switches complete within a few working days with minimal or no downtime. If you have not switched in 18 months, you are almost certainly paying an out-of-contract premium of around 18%. A 10-minute postcode check could save you £100 to £300 a year.

One Touch Switch (OTS), launched 12 September 2024 by TOTSCo, is the most significant operational change in UK broadband retail since Gaining Provider Led switching in 2015. Under OTS, a customer wishing to switch ISP needs only to contact the gaining provider, which orchestrates the entire transfer including notice on the losing provider and any cease, port, or migrate. By end-2025, over two million customers had used OTS (Ofcom, 2026), and TOTSCo reported a match-rate (the proportion of switch requests that successfully match the losing provider's records on first attempt) of around 67-68%, up from 60% at launch.

Annual switching activity jumped from approximately 14% of households in 2023 (around 4.0 million switches) to 18% in 2024 (5.2 million) and an estimated 20% in 2025 (5.8 million). The April 2026 price rise round drove a further switching surge: one in five customers switched or planned to switch in response to the £3-£4 monthly increases (Uswitch April 2026 Opinium survey). The remaining 32% match-rate gap is the most important operational metric in UK retail broadband: when OTS reaches 90%+ match, switching friction will be effectively zero and the market will function closer to a true competitive ideal. TOTSCo has set internal targets of 80% by end-2026 and 90% by end-2027.

SECTION METRIC 13 · USAGE · DATA CONSUMPTION

Average data consumption per fixed line.

QUICK ANSWER

Average monthly data consumption per fixed broadband line has risen from 17 GB in 2011 to 535 GB in 2023 and an estimated 580 GB in 2025. COVID-19 produced a clear step change in 2020. FTTP lines today already average 766 GB per month. By 2030, the 1 TB per month threshold is likely to be crossed on average.

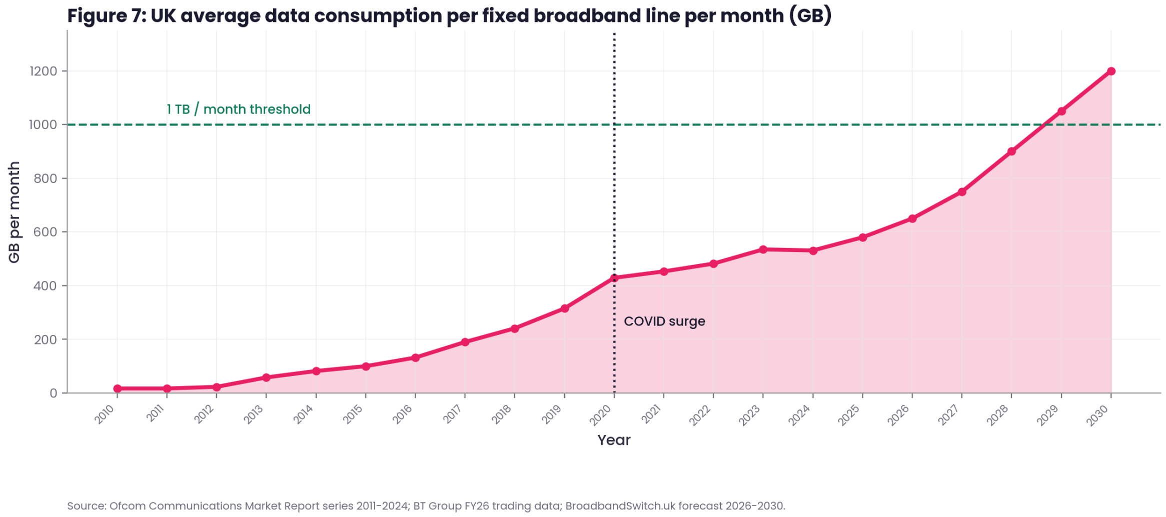


Figure 7: UK average data consumption per fixed broadband line per month (GB). Source: Ofcom Communications Market Report series 2011-2024; BT Group FY26 trading data; BroadbandSwitch.uk forecast 2026-2030.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

UK households now use roughly 35 times more data than they did in 2011. Almost all of this is streaming video (Netflix, Disney+, Amazon Prime Video, iPlayer, YouTube), cloud gaming, video calls, and software updates running quietly in the background. Crucially: data caps disappeared from almost every UK consumer broadband plan years ago, so this usage growth costs you nothing extra. Use as much as you like.

Average monthly data consumption per fixed broadband line has risen from 17 GB in 2011 to 535 GB in 2023 and an estimated 580 GB in 2025. COVID-19 produced a clear step change in 2020 (315 GB in 2019 to 429 GB in 2020). Streaming (Netflix, Disney+, Amazon Prime Video) is the single biggest driver, followed by cloud gaming, video calling, and software updates. By 2030, the 1 TB per month threshold is likely to be crossed on average; FTTP lines today already average 766 GB per month (Ofcom, 2024).

SECTION METRIC 14 · QUALITY · COMPLAINTS

Ofcom complaints per 100,000 customers.

QUICK ANSWER

Ofcom Q3 2024 data shows TalkTalk receiving 14 complaints per 100,000 broadband customers, Vodafone 12, EE 11, against an industry average of 10. Plusnet (5), Sky (5), NOW (8), BT (9), and Virgin Media (9) led the table. Complaint rates have declined steadily from a 2017 peak of 22 per 100,000.

The most recent full Ofcom complaints data (Q3 2024) shows TalkTalk receiving 14 complaints per 100,000 broadband customers, Vodafone 12, EE 11, against an industry average of 10. The best performers were Plusnet (5), Sky (5), NOW (8), BT (9), and Virgin Media (9). Q4 2025 data showed Vodafone (11) and TalkTalk (10) topping broadband complaints, with Plusnet and Virgin Media generating the fewest.

Complaint rates have declined steadily across the industry from a 2017 peak of 22 per 100,000 to 10 per 100,000 in 2024, reflecting improvements in fault handling, billing accuracy, and customer service. Ofcom's automatic compensation scheme, introduced April 2019, has played a meaningful role: providers must now pay a fixed daily amount when service is delayed or missed, regardless of whether the customer asks.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

A 4-point gap between the best (Plusnet, Sky) and worst (TalkTalk, Vodafone) is meaningful. If you have a choice of providers at your postcode and you care about good service when things go wrong, the complaints data is one of the best independent signals available. Ofcom publishes this quarterly; check before you sign a 24-month contract.

SECTION METRIC 15 · COVERAGE · RURAL VS URBAN

UK rural vs urban broadband.

QUICK ANSWER

The rural-urban gap narrowed substantially between 2017 and 2023, then re-opened in 2024-2025 as urban FTTP take-up and altnet competition delivered very high speeds in cities while rural rollouts lagged. Urban average maximum download is 245 Mbit/s vs rural 130 Mbit/s. On FTTP coverage, rural areas are at 51% vs urban 75%.

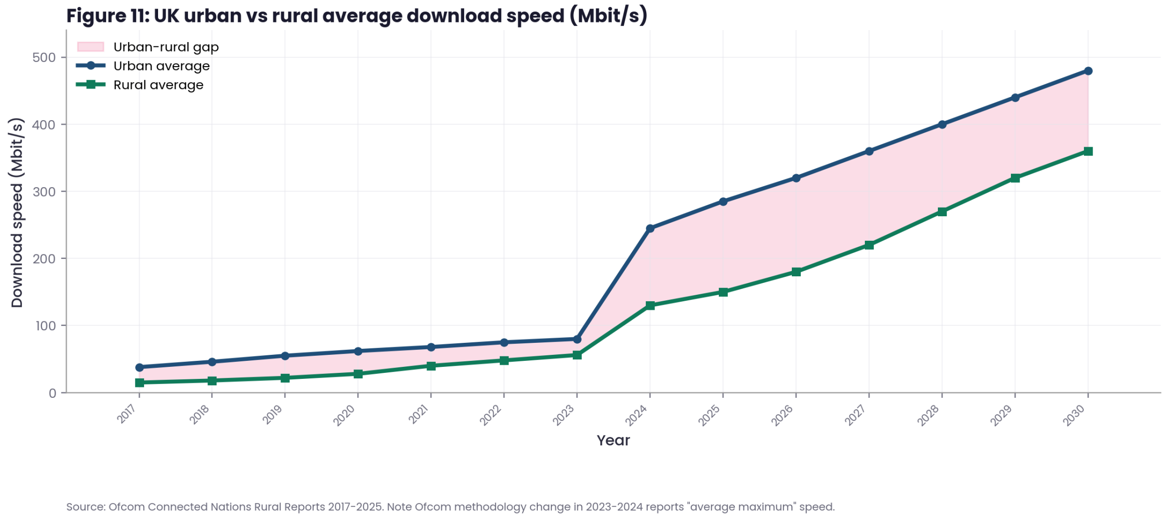


Figure 11: UK urban vs rural average download speed (Mbit/s). Source: Ofcom Connected Nations Rural Reports 2017-2025.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

If you live in a rural village or hamlet, you may still be on an older copper line while your friends in town have switched to gigabit fibre. Project Gigabit's rural build is closing this gap rapidly through 2026-2028. In the meantime, 5G Fixed Wireless Access (FWA) and Starlink satellite are both genuine alternatives for rural homes - typical FWA delivers 100-300 Mbit/s, Starlink 80-200 Mbit/s, and both can be installed in days rather than waiting for the fibre lorry.

The rural-urban gap in UK broadband narrowed substantially between 2017 and 2023, then re-opened in 2024-2025 as urban FTTP take-up and altnet competition delivered very high speeds in cities while rural rollouts lagged. Ofcom Connected Nations 2024 reports urban average maximum download speed of 245 Mbit/s versus rural 130 Mbit/s, a 115 Mbit/s gap that is in absolute terms larger than the 2017 gap (38 versus 15 Mbit/s) but smaller in proportional terms.

On FTTP coverage, rural areas reached 51% (2024) versus urban 75%. Project Gigabit's GIS-funded build will close most of this gap by 2028, with rural FTTP forecast to exceed 89% by 2028 and 96% by 2030 on BroadbandSwitch.uk modelling.

SECTION METRIC 16 · EQUITY · DIGITAL DIVIDE

Premises without decent broadband.

QUICK ANSWER

The "decent broadband" gap (premises unable to receive 10 Mbit/s) has fallen from 1.1 million in 2017 to 48,000 in January 2025 and 39,000 in April 2026. The Universal Service Obligation (USO), launched 20 March 2020, has served 9,089 premises with 461 builds in progress. The introduction of cheaper Starlink Mini tariffs in 2025-2026 reduced the unaffordable-decent gap to just 4,000.

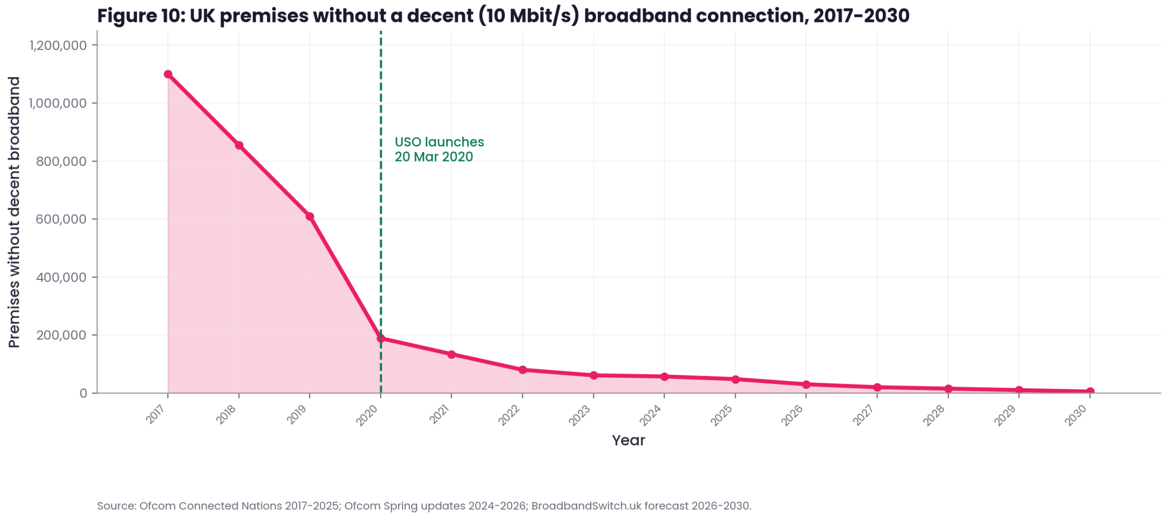


Figure 10: UK premises without a decent (10 Mbit/s) broadband connection, 2017-2030. Source: Ofcom Connected Nations 2017-2025; Ofcom Spring updates 2024-2026.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

If you cannot get a "decent" 10 Mbit/s broadband connection, you have legal rights. Under the Universal Service Obligation, BT (or KCOM in Hull) must connect you up to a build cost of £3,400 per premises - you only pay the standard installation fee plus monthly service. Beyond that cap, Starlink Mini at around £30 a month is now a genuine alternative that almost always works. Project Gigabit will likely reach you within 2 to 3 years on current schedules.

The "decent broadband" gap, defined as premises unable to receive 10 Mbit/s download and 1 Mbit/s upload from a fixed or fixed-wireless network, has fallen from 1.1 million premises in 2017 to 48,000 in January 2025 and 39,000 in April 2026. The Universal Service Obligation, launched 20 March 2020 with BT as Universal Service Provider for the UK (excluding Hull), has played a meaningful but not transformative role: by April 2026, BT had served 9,089 premises under the USO with 461 builds in progress (BT, 2026). Wider gigabit and FTTP rollouts have done more of the work. The introduction of cheaper Starlink Mini tariffs in 2025-2026 has reduced the number of premises unable to access an "affordable decent" service to just 4,000 (Ofcom, 2026). By 2030, the affordable decent gap should be effectively closed at under 5,000 premises nationally.

SECTION METRIC 17 · MOBILE · 5G AND FWA

Mobile, 5G and Fixed Wireless Access.

QUICK ANSWER

4G outdoor premises coverage reached 99% in 2018. 5G coverage has grown from 5% in 2019 to 24% in 2020, 69% in 2022, 85% in 2024, and 90% in 2025. Fixed Wireless Access (FWA) subscribers have grown from approximately 50,000 in 2018 to 1.5 million in 2025. All three UK mobile networks now offer 5G FWA at consumer-meaningful prices.

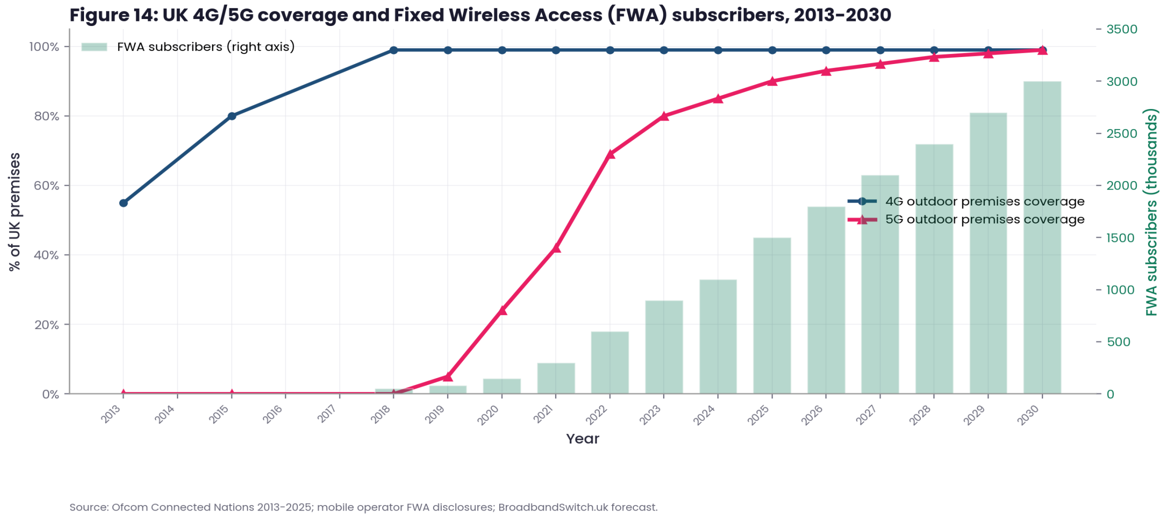


Figure 14: UK 4G/5G coverage and Fixed Wireless Access (FWA) subscribers, 2013-2030. Source: Ofcom Connected Nations 2013-2025; mobile operator FWA disclosures.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

5G home broadband is now a serious alternative to fixed-line in many areas. EE, VodafoneThree, and Virgin Media O2 all offer 5G FWA at £20 to £35 per month, often with no contract and unlimited data. Speeds typically run 100 to 300 Mbit/s, latency is usually under 30 ms (fine for almost anything except competitive gaming), and setup is plug-and-play. This is particularly useful for renters, students, anyone in a new-build still waiting for fibre, or as a backup line for working from home.

4G outdoor premises coverage from at least one operator reached 99% by 2018 (Ofcom CN2018). 5G coverage has grown from 5% in 2019 (the year of commercial launch on 30 May 2019 by EE) to 24% in 2020, 69% in 2022, 85% in 2024, and 90% in 2025. The 5G Standalone (SA) cores enabling network-slicing and ultra-low-latency are now live on EE, Vodafone, and Three, with VodafoneThree consolidating cores during 2025-2026 following the May 2025 merger.

Fixed Wireless Access (FWA) subscribers have grown from approximately 50,000 in 2018 to 1.5 million in 2025. All three UK mobile networks (BT/EE, VodafoneThree following the 31 May 2025 merger, and Virgin Media O2) now offer 5G FWA at consumer-meaningful prices, typically £20 to £35 per month and often with unlimited data. FWA is increasingly viable as a primary household broadband connection rather than just a backup.

SECTION METRIC 18 · SATELLITE BROADBAND

Starlink, Kuiper, and the satellite revolution.

QUICK ANSWER

Satellite broadband has gone from niche to mainstream in three years. Starlink reached over 110,000 UK subscribers in 2025, with consumer plans from around £30 a month for the Mini hardware. Amazon's Project Kuiper received its UK non-geostationary satellite licence on 3 February 2025; consumer service expected to launch in 2026. OneWeb operates in the UK B2B market.

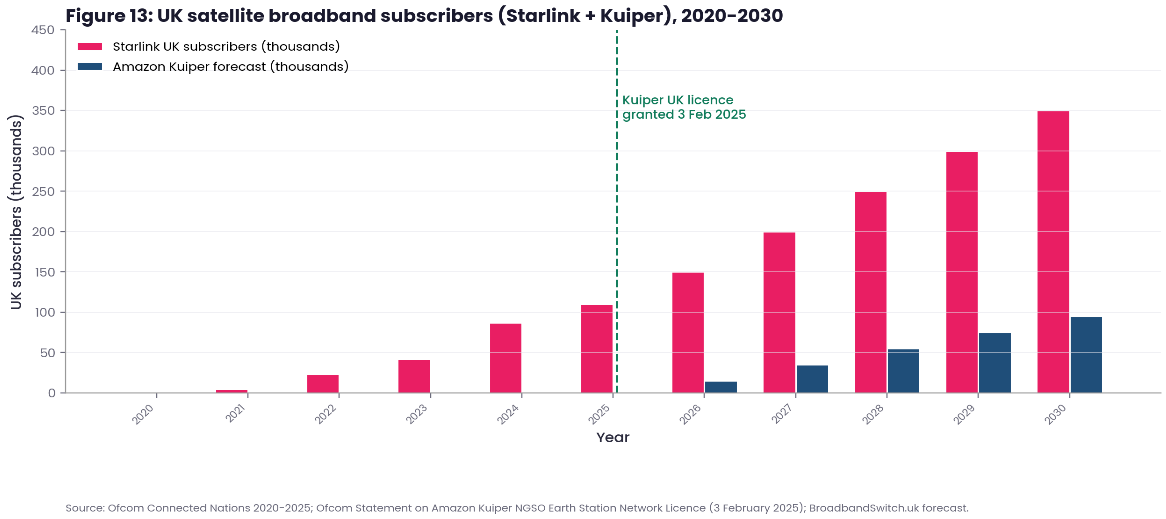


Figure 13: UK satellite broadband subscribers (Starlink and Kuiper), 2020-2030. Source: Ofcom Connected Nations 2020-2025; Ofcom Statement on Amazon Kuiper NGSO Earth Station Network Licence (3 February 2025); BroadbandSwitch.uk forecast.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

If you live somewhere fixed-line broadband simply does not reach, satellite is finally a credible everyday option rather than an exotic edge case. Starlink Mini at around £30 a month and £200 hardware delivers 80 to 200 Mbit/s downloads and 5 to 25 Mbit/s uploads, with installation in a single afternoon. Latency is good (around 30 to 50 ms) - genuinely usable for video calls, streaming, and most online gaming. Amazon Kuiper consumer launches in 2026 will introduce real price competition for the first time, likely pushing entry prices below £25 a month by 2027 or 2028.

Satellite broadband in the UK has moved through three distinct phases over the past five years. Phase one (pre-2022) was traditional geostationary satellite - Avanti, Tooway, and others operating at altitudes around 36,000 km with latencies of 600 to 800 ms that made interactive applications unworkable. Phase two (2022-2024) was Starlink's arrival in the UK at scale: a Low Earth Orbit (LEO) constellation operating at around 550 km altitude with latencies of 25 to 50 ms, comparable to fixed-line broadband for most purposes. Phase three (2026 onwards) will be the multi-constellation era as Amazon's Project Kuiper launches consumer service in the UK, bringing competition to Starlink for the first time.

Starlink: the present-day baseline

Starlink UK subscribers reached over 110,000 in 2025, with average growth running approximately 30,000 per year. Three product tiers are now available in the UK: Starlink Mini (the entry consumer tier, around £30 a month + £200 hardware), Starlink Standard (around £75 a month + £350 hardware), and Starlink Roam (mobile use case). Typical UK speeds run 80 to 200 Mbit/s download, 5 to 25 Mbit/s upload, with latencies of 25 to 50 ms. Ofcom Spring 2026 update reported that the introduction of cheaper Starlink Mini tariffs in 2025-2026 reduced the "premises unable to access an affordable decent service" count to just 4,000 nationally.

Amazon Project Kuiper: the 2026 challenger

Ofcom granted Amazon Kuiper Services Europe SARL a non-geostationary satellite earth station network licence on 3 February 2025 (Ofcom, 2025). Project Kuiper plans a constellation of 3,236 satellites in Low Earth Orbit, with consumer service launching in the UK in 2026. Pricing has not yet been formally announced for the UK market but Amazon has indicated competitive intent on consumer pricing. Expect a real challenge to Starlink in 2027-2028 once the constellation reaches operational density.

OneWeb: the B2B player

Eutelsat OneWeb (the UK-headquartered LEO operator that merged with Eutelsat in September 2023) operates a 648-satellite constellation focused primarily on enterprise, government, maritime, and aviation markets rather than consumer. OneWeb is meaningful in the UK B2B market and to some rural enterprise users but is not a direct consumer product today.

Satellite vs fixed line: a practical comparison

Metric	Starlink Mini	Openreach FTTP	5G FWA
Typical download	80 to 200 Mbit/s	100 Mbit/s to 1 Gbit/s	100 to 300 Mbit/s
Typical upload	5 to 25 Mbit/s	20 Mbit/s to 1 Gbit/s	10 to 100 Mbit/s
Latency	25 to 50 ms	5 to 15 ms	10 to 30 ms
Hardware cost	Approx £200	Free with contract	Free with contract
Monthly cost	Around £30 to £75	£22 to £50	£20 to £35
Setup time	1 day (self-install)	1 to 4 weeks (engineer)	1 day (self-install)
Contract terms	Monthly rolling	12 or 24 months typical	Monthly to 24 months
Best for	Rural, mobile, backup	Most fixed locations	Urban / suburban

The economics of satellite at scale

The economics of LEO satellite broadband have changed beyond recognition since 2020. SpaceX has reduced satellite launch cost per kilogram from approximately $20,000 in 2010 to under $2,000 in 2024 through Falcon 9 reusability. Starshield and Starship will likely push that to $500 or below. At those launch economics, replacement constellations become cheap enough that price competition with terrestrial fibre at the margin becomes genuine. For rural UK households, this means satellite costs will continue to fall through 2026-2030 even as service quality improves.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

Three to five years ago, satellite broadband meant accepting half-second latency that made web browsing painful and video calls impossible. Today, a properly installed Starlink Mini gives you a connection that feels like a normal fixed-line broadband for everything except the most competitive online gaming. By 2027-2028, with Kuiper live and Starlink upgraded, satellite will be a fully viable everyday choice for rural households, with monthly costs comparable to entry-tier FTTP. This is the single biggest change for rural Britain in 25 years.

SECTION METRIC 19 · ALTNETS

The UK altnet sector.

QUICK ANSWER

From under 1.5 million premises passed in 2018 to 19.7 million by end-2025, altnets now collectively pass roughly two-thirds of UK premises. Live connections have grown from 0.4 million to 3.5 million over the same period. CityFibre is the largest at 4.7 million premises passed. Consolidation has begun in 2024-2026.

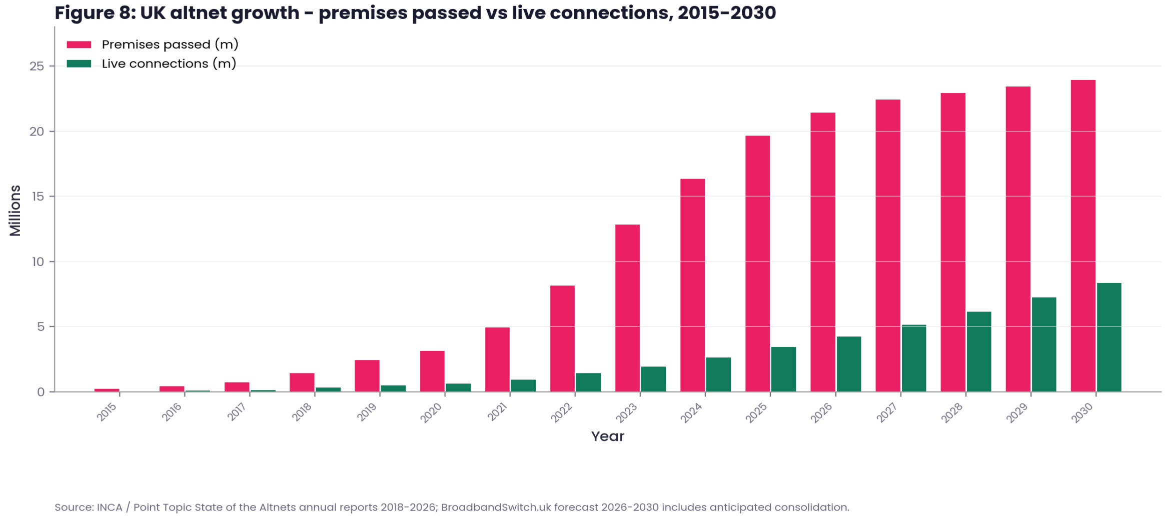


Figure 8: UK altnet growth - premises passed vs live connections, 2015-2030. Source: INCA / Point Topic State of the Altnets annual reports 2018-2026.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

Altnets - companies you may not have heard of like CityFibre, Hyperoptic, Community Fibre, YouFibre - have quietly transformed UK broadband over the past five years. In many postcodes, especially in London and major cities, they offer the best value packages on the market. Symmetric uploads, no mid-contract price rises, faster speeds for the same money. Always check what altnets are available at your postcode before signing with a big-five provider.

The UK altnet sector has been one of the most striking infrastructure stories of the past five years. From under 1.5 million premises passed in 2018 to 19.7 million by end-2025 (INCA & Point Topic, 2026), altnets now collectively pass roughly two-thirds of UK premises. Live connections have grown from 0.4 million to 3.5 million over the same period.

The major altnets by premises passed at end-2025 are: CityFibre 4.7 million (4.5 million RFS), Netomnia/YouFibre 2.5-2.8 million, Community Fibre 1.7 million, Hyperoptic 1.3 million, Gigaclear 0.6 million, Fibrus 0.5 million, with the remainder spread across 90+ smaller operators.

Consolidation timeline 2024-2026

Date	Event
2024	CityFibre acquires Lit Fibre; Netomnia and Brsk merge

Date	Event
March 2025	CityFibre acquires Connexin
August 2025	Virgin Media O2 acquires Daisy (B2B), £1.3bn
Q1 2026	Netomnia / VMO2 owners deal announced, in CMA probe
2026 to 2028 (forecast)	5 to 10 surviving major altnet groupings expected

SECTION METRIC 20 · QUALITY · SATISFACTION

UK ISP customer satisfaction and USO.

QUICK ANSWER

Plusnet has consistently led Ofcom's customer satisfaction tracker, reaching 94% satisfied overall in 2024. Sky (88%), EE (86%), Vodafone (84%) and BT (81%) cluster around the industry average of 82%, with TalkTalk (77%) and Virgin Media (76%) below. Trustpilot aggregations show top altnets like YouFibre, Community Fibre and Hyperoptic outperforming the big four.

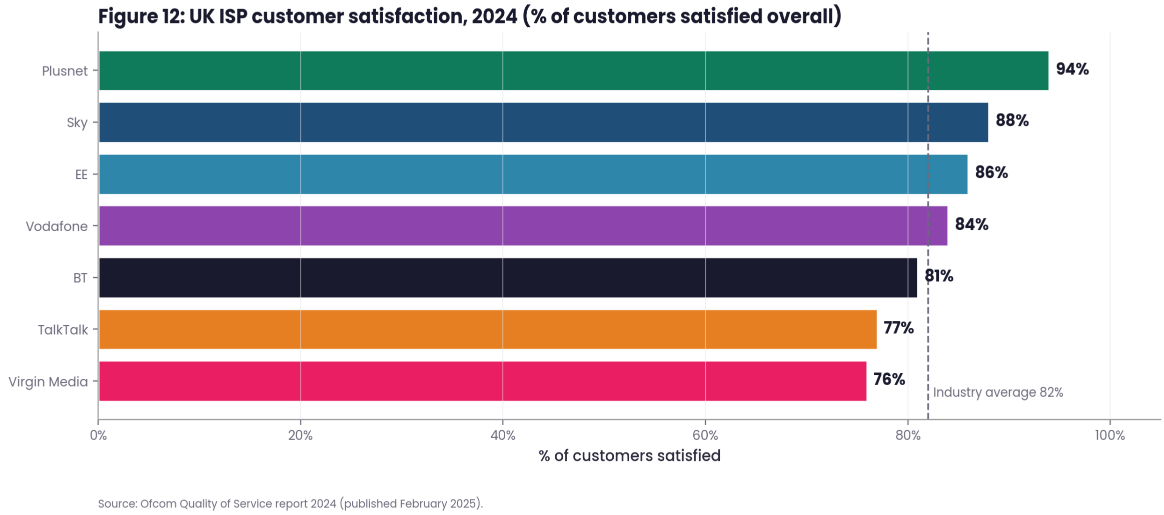


Figure 12: UK ISP customer satisfaction, 2024 (% of customers satisfied overall). Source: Ofcom Quality of Service Report 2024 (published February 2025).

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

An 18-point gap between best (Plusnet, 94%) and worst (Virgin Media, 76%) is significant. Customer satisfaction matters most when things go wrong - bills, faults, moves, changes - which happens to most households at some point in a 24-month contract. Pair satisfaction data with complaints data (Metric 14) for the clearest signal: Plusnet, Sky and EE consistently appear at the top of both rankings. Among altnets (not in Ofcom data), Trustpilot aggregations show YouFibre, Community Fibre, and Hyperoptic regularly above 90% satisfaction.

Plusnet has consistently led Ofcom's customer satisfaction tracker, reaching 94% satisfied overall in 2024 (Ofcom, 2025). Sky (88%), EE (86%), Vodafone (84%), and BT (81%) cluster around the industry average of 82%, with TalkTalk (77%) and Virgin Media (76%) below. Independent Trustpilot review aggregations consistently show top-rated altnets like YouFibre, Community Fibre, and Hyperoptic outperforming all the big four on review scores, though with smaller sample sizes.

Universal Service Obligation (USO)

The Universal Service Obligation entered force on 20 March 2020, designating BT (and KCOM in Hull) as the universal service provider for a 10 Mbit/s downstream and 1 Mbit/s upstream service. By April 2026, BT had served 9,089 premises under the USO with 461 builds in progress (BT, 2026). The cost cap of £3,400 per premises limits the USO's reach in the most remote rural locations; below that cap, BT must deliver, and customers pay only the standard installation fee plus monthly service charges. The USO has been overtaken in importance by the £5 billion Project Gigabit programme, which targets gigabit-capable broadband at 99% of UK premises by 2032. Both programmes share the same underlying premises (BDUK's rural address database, supplier-led builds) and increasingly the same suppliers (Openreach as USP under USO and as GIS contractor under Project Gigabit).

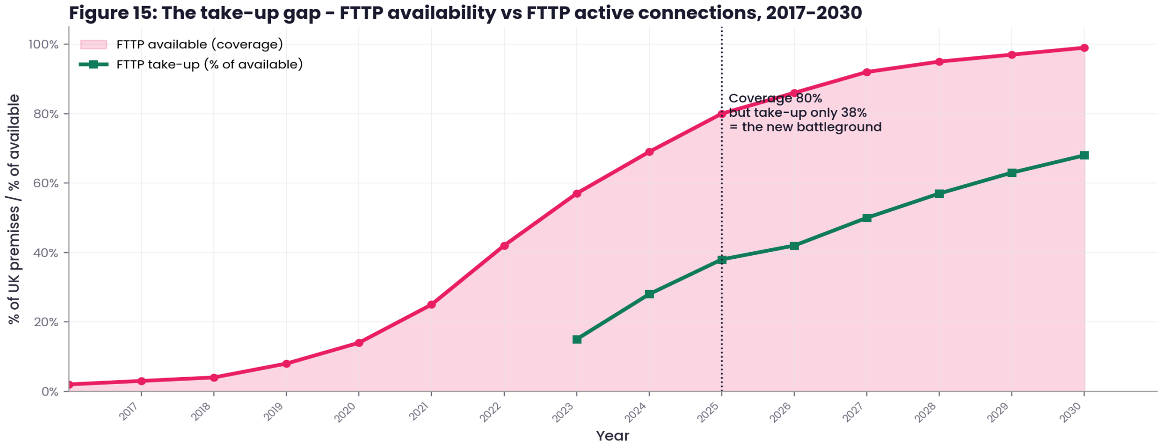
SECTION ANALYSIS · THE TAKE-UP GAP

Coverage is solved. Take-up is the new battleground.

QUICK ANSWER

FTTP coverage hit 80% in September 2025. But Openreach take-up is just 38.27%, with altnets averaging 18%. The gap between premises passed and active connections is the new battleground for UK broadband: roughly 60% of available FTTP capacity sits unused. Closing this gap is the central commercial challenge of 2026-2030.

Figure 15: The take-up gap - FTTP availability vs FTTP active connections, 2017-2030



Source: Ofcom Connected Nations 2017-2025; BT Group FY26 results (38.27% Openreach take-up at 31 March 2026); BroadbandSwitch.uk forecast.

Figure 15: The take-up gap - FTTP availability vs FTTP active connections, 2017-2030. Source: Ofcom Connected Nations 2017-2025; BT Group FY26 results.

SO WHAT? PLAIN ENGLISH FOR UK CONSUMERS

If you have FTTP available at your postcode but have not switched yet, you are not alone - around 6 in 10 UK households in this position have not made the move yet. But the longer you wait, the more value you leave on the table. Switching from FTTC to FTTP at the same speed tier typically reduces monthly cost or improves reliability for the same money, and unlocks symmetric uploads for video calls and cloud backup. It costs nothing to check; if your address is full-fibre ready, the switch is genuinely worth doing.

The take-up gap is the most important commercial story in UK broadband for the second half of this decade. Coverage has been solved with extraordinary speed - 3% to 80% FTTP availability in seven years - but conversion to live connections has lagged substantially. At 31 March 2026, Openreach reported 22.92 million FTTP premises passed against 8.77 million live FTTP customers, a 38.27% take-up rate. Altnets are running materially lower at an average of 18%.

There are five reasons take-up lags coverage at this point in the cycle: existing FTTC customers are often content with their service and have no urgent reason to upgrade; end-of-contract dates are sticky (most households only think about switching at renewal, 18 to 24 months apart); FTTP-specific marketing remains under-developed; the value proposition of "the same speed for the same money but on better wires" is real but technically subtle; and FTTP availability is uneven within postcodes. The next five years will be defined by how successfully the industry, regulators, and consumer advocates close this gap. The PSTN switch-off on 31 January 2027 will force-migrate many copper-based customers and accelerate FTTP take-up. Project Gigabit's rural builds will continue to push coverage to 99% by 2032. And One Touch Switch, now at 67-68% match-rate, will reduce friction further once it reaches the 90%+ target by end-2027.

SECTION 04 · PART 2 · EXPANSION AREAS

Twelve deeper dives: A to L.

Twelve areas where the data warrants more detail than the consumer-facing metrics in Part 1. These are the structural facts behind the headlines.

A. Wholesale market

Openreach's regulated wholesale prices anchor the entire UK fixed broadband market. Key prices at FY25-26: Generic Ethernet Access at 40/10 Mbit/s on FTTC sits at approximately £10.07/month wholesale plus MPF at £6.10/month; FTTP 40/10 at the regulated anchor of £11.77/month list, with material discounts under the Equinox 2 commercial offer (effective April 2023, running to 2031). Equinox 2 cuts higher-speed FTTP rental 8-15% versus Equinox 1.

B. BT and Openreach capex

BT Group total capex peaked at approximately £5.1bn in FY23 and is now declining through £4.8bn (FY24) and £4.2bn (FY25) as the FTTP build approaches its 25 million target. The full FTTP programme to 25 million premises will cost approximately £15bn from inception to completion in late 2026 or early 2027, at an average build cost of approximately £300 per premises.

C. M&A activity

The major UK telecoms transactions since 2000: NTL/Telewest/Virgin Mobile combination into Virgin Media (2006, $20bn); Orange/T-Mobile UK merger into Everything Everywhere (2010, £14bn JV); Liberty Global acquisition of Virgin Media (2013, $23.3bn); BT/EE merger (2016, £12.5bn); VMO2 JV formation (2021, £31.4bn EV); Netomnia/Brsk merger (2024); CityFibre/Lit Fibre (2024); Vodafone/Three merger completing VodafoneThree on 31 May 2025 (£16.5bn); VMO2 acquiring Daisy (B2B, 2025).

D. Social tariff uptake

Social tariff customers grew from approximately 55,000 in February 2022 (1.3% of the eligible base) to 220,000 in February 2023, 380,000 in September 2023, 506,000 in June 2024 (9.6% of eligible), and 532,000 in June 2025. BT accounts for 64% of all fixed broadband social tariff connections, Sky 24%, Virgin Media O2 6%, Vodafone 4%, and KCOM 2%. Citizens Advice estimates that more than £800 million in support is going unclaimed annually because 91% of eligible customers are unaware they qualify.

E. Mid-contract price rises

Inflation-linked mid-contract rises peaked in April 2023 with major providers applying CPI plus 3.9% (around 14.4%): BT, EE, Plusnet, Vodafone, and TalkTalk all matched this formula. Virgin Media applied RPI plus 3.9% in April 2024. From 17 January 2025, Ofcom's ban on inflation-linked rises forces providers to express any in-contract increases in pounds and pence at the point of sale. Typical 2026 rises: BT/EE £3.00 to £3.50 per month broadband; mobile £1.50 to £1.80.

F. Project Gigabit

The £5bn Project Gigabit programme, launched March 2021, aims to deliver gigabit-capable broadband to the final approximately 10% of UK premises by 2032 (revised from the original

2030 target). As of May 2026, 256,680 premises had been built under Gigabit Infrastructure Subsidy (GIS) contracts of 837,340 planned (31% complete). Major awards include Openreach (multiple regional contracts), CityFibre (Bedfordshire and Northants and Milton Keynes, rescoped to £500.7m for 227,000 premises in May 2026), Gigaclear (Oxfordshire £26.5m), and Fibrus (Northern Ireland £165m).

G. PSTN switch-off

Originally planned for December 2025, BT announced on 20 May 2024 a revised end date of 31 January 2027 for the full PSTN/WLR switch-off. National stop-sell of analogue voice on the PSTN took effect 5 September 2023. As of February 2026, more than 1,281 exchanges covering 12.5 million premises had entered stop-sell. Trial exchanges where WLR was withdrawn early include Salisbury and Mildenhall (October 2023), Deddington (March 2024), Kenton Road, and Ballyclare (September 2024).

H. Spectrum auctions

The UK has held five major spectrum auctions for mobile use: 3G at 2.1 GHz raised £22.5bn in April 2000 (a famously inflated outcome); 4G at 800 MHz and 2.6 GHz raised £2.34bn in February 2013; 5G at 2.3 GHz and 3.4 GHz raised £1.36bn in March-April 2018; 5G at 700 MHz and 3.6-3.8 GHz raised £1.35bn in March 2021; and mmWave (26 GHz and 40 GHz) raised approximately £39m in 2025, with EE, Virgin Media O2, and VodafoneThree each spending around £13m.

I. Ofcom fines

Notable Ofcom enforcement actions: BT £750k (2011, number portability); TalkTalk £3m (2011, misbilling); TalkTalk £750k (2013, silent calls); Vodafone £4.6m (2016, complaint handling); BT £42m (2017, Ethernet compensation breach); TalkTalk £100k (2017, data protection); Virgin Media £7m (2020, ETC); BT £6.3m (2021, automatic compensation failure); BT £17.5m (2024, 999 service failure); Virgin Media £23.8m (2025, vulnerable telecare migration failure); Vonage £700k (2025, emergency call failures).

J. Voucher schemes

The Better Broadband Voucher and Rural Broadband schemes (2014 to 2020) issued approximately 25,000 vouchers at £300 each. The Gigabit Broadband Voucher Scheme (March 2018 to March 2021) spent approximately £193m on 78,000 vouchers. Project Gigabit voucher scheme relaunch (April 2022 to March 2024, then extended to March 2028) has approximately £210m allocated. Average voucher value: £1,500 to £3,500 per premises depending on rurality.

K. UK vs G7 international benchmarks (2024)

On a like-for-like methodology basis, Japan leads on average download speed (around 380 Mbit/s) and FTTP coverage (99%), France leads on FTTP coverage in Europe (92%), and the UK is joint-cheapest with Italy on standalone fixed broadband at around £32 per month average bill. Germany trails on FTTP (35% coverage in 2024) due to dominant DOCSIS deployment.

L. Cost per premises

BT/Openreach commercial FTTP build averages around £300 per premises. Commercial altnet build runs £400 to £700 per premises with rural skewing higher. The BDUK Superfast Programme (2013 to 2020) averaged approximately £1,000 per premises in subsidy. Project

Gigabit's GIS contracts for the final rural 10% are running at £1,500 to £3,500 per premises subsidy. The USO cost cap of £3,400 per premises is the de facto upper bound for "economically reasonable" connection cost.

SECTION 05 · PART 3 · TIMELINE

Regulatory and policy milestones 2000–2027.

Every event that materially shaped the UK consumer broadband market between 2000 and the confirmed 31 January 2027 PSTN switch-off.

Date	Event
March 2000	BT Openworld commercial ADSL launch
December 2000	BT publishes Reference Offer for Local Loop Unbundling
2002	LLU rollout accelerates as Ofcom drives wholesale prices down
29 December 2003	Communications Act 2003 establishes Ofcom as sole communications regulator
April 2009	Digital Britain report; first commercial FTTP trial at Ebbsfleet
April 2010	BT Infinity (FTTC) launches commercially
December 2010	Digital Economy Act 2010
December 2012	First BDUK-funded superfast cabinet delivered
February 2013	4G spectrum auction concludes; UK 4G launch
November 2016	Ofcom Digital Communications Review recommends legal separation of Openreach
March 2017	Openreach legally separated from BT
27 April 2017	Digital Economy Act 2017 receives Royal Assent (basis for USO)
May 2018	ASA introduces median-actual speed advertising rule
June 2019	Fairness for Customers commitments signed by major ISPs
20 March 2020	Broadband USO enters force
March 2021	Project Gigabit launched (£5bn programme)
December 2021	Virgin Media completes DOCSIS 3.1 gigabit upgrade across HFC footprint
2022	Openreach completes nationwide PSTN stop-sell for new lines
April 2023	Equinox 2 wholesale FTTP pricing takes effect
5 September 2023	National stop-sell of analogue voice on PSTN
10 April 2024	Ofcom proposes ban on inflation-linked mid-contract price rises
20 May 2024	BT confirms PSTN switch-off delayed to 31 January 2027

Date	Event
12 September 2024	One Touch Switch (OTS) goes live; NoT+ retired 24 October 2024
17 January 2025	Ofcom ban on inflation-linked mid-contract rises takes effect
3 February 2025	Ofcom grants Amazon Kuiper non-geostationary satellite licence
31 May 2025	Vodafone/Three merger completes (£16.5bn) creating VodafoneThree
March 2026	Ofcom Telecoms Access Review 2026 (TAR26) final statement
31 January 2027	Confirmed full PSTN/WLR switch-off date
2032 (target)	Project Gigabit nationwide (99%) gigabit coverage target

SECTION 06 · PART 4 · FUTURE OUTLOOK

The UK broadband market 2026 to 2030.

QUICK ANSWER

Five forces shape the 2026 to 2030 outlook: completion of FTTP build to near-99% coverage; the 31 January 2027 PSTN switch-off; altnet consolidation into 5 to 10 strong groupings; TAR26 wholesale price caps from March 2026; and the satellite + 5G FWA challenge to fixed-line at the rural margin.

Project Gigabit and the 99% target

Building Digital UK's May 2026 progress update shows 256,680 premises built under GIS contracts of 837,340 planned (31% complete). The "nationwide" (approximately 99%) gigabit target has been formally pushed back from 2030 to 2032 in DSIT planning following CityFibre's May 2026 contract rescoping. Ofcom's January 2028 forecast range remains 91% to 97% of homes.

PSTN switch-off

The 31 January 2027 hard deadline is now extremely unlikely to slip further. As of FY26, approximately 1.66 million ADSL connections remained on BT's network. Openreach's Emergency Voice Access (EVAc) pilot, Prove Telecare process, and Battery Backup Unit programme are intended to safeguard vulnerable customers during the final migration window.

FTTP completion

Openreach is on track to hit 25 million Full Fibre premises between November 2026 and January 2027. BT Group's FY26 results (21 May 2026) confirmed 22.921 million FTTP premises passed. Combined with altnet builds of 19.7 million and Virgin Media O2 / nexfibre's combined 8 million plus, the UK has the potential for FTTP coverage approaching 99% by 2030.

Altnet consolidation

Ofcom's TAR26 consultation describes altnet consolidation as "a regulatory necessity for sustainable competition". Expect 5 to 10 strong regional altnet groupings to emerge by 2028. The Netomnia/VMO2-owner deal (in CMA probe Q2 2026) is the bellwether for the consolidation regime. If the CMA blocks, consolidation will proceed more harshly via debt restructuring.

Pricing

With pounds-and-pence price rises mandated from January 2025, most major providers will continue to apply £3 to £4 monthly broadband annual increases against headline CPI of 2 to 3%. Real-terms competition between altnets and incumbents will continue to suppress new-customer prices. Community Fibre at £19/month for symmetric 150 Mbit/s, Vodafone Pro at £23, and Hyperoptic at £45 set the floor for new-customer pricing.

5G FWA and satellite

All three (post-VodafoneThree) UK mobile networks offer 5G FWA, with mid-band 5G capable of 100 to 300 Mbit/s. Starlink reached over 110,000 UK subscribers in 2025 and introduced cheaper Mini tariffs. Amazon Kuiper consumer service is expected to launch in 2026. Together these reduce the "unaffordable decent" premises count to under 5,000 by 2030.

Regulatory

TAR26 (Ofcom's 2026 to 2031 wholesale review) sets the price cap on Openreach's regulated products, determines whether to extend "no-build" geographic exemption areas, and defines obligations on altnets achieving significant market power locally. Final statement was published in March 2026. Ofcom's mid-2026 consultations on automatic compensation, social tariff awareness, and customer fairness are also live.

Consumer behaviour and AI/IoT demand

Average household data usage is on track to exceed 1 TB per month before 2030. AI assistants in TV platforms, cloud gaming, and ambient compute will push median household usage past 1 TB by 2028. Median upload requirements are rising particularly fast as home working, content creation, and cloud backup normalise.

SECTION 07 · PART 5 · RECOMMENDATIONS

What this means for UK households.

QUICK ANSWER

Four practical recommendations for UK households in 2026. Switch this contract cycle if FTTP is available; claim a social tariff if eligible; plan PSTN migration during 2026 if you have a copper landline; and re-contract if you have not switched in 18 months.

Now (2026)

Households still on FTTC or ADSL in postcodes with Openreach or altnet full-fibre available should switch this contract cycle. The single biggest savings opportunity is at end-of-contract. Customers eligible for a social tariff (around 5 million households) should claim one. Re-check One Touch Switch eligibility: with the match success rate now around 67-68%, switching should complete within 48 hours for two-thirds of attempts.

Short term (by January 2027)

Anyone still relying on a copper landline, ADSL, or FTTC connection should plan migration in 2026. The 31 January 2027 PSTN deadline is hard, and engineer capacity will tighten through 2026. Telecare users should engage their alarm-receiving centre and provider via the Prove Telecare process now.

Medium term (2027 to 2028)

Expect 5-10 strong altnet groupings to emerge from consolidation. Consumers in areas served by two or more altnets currently pay an average of £7.88 per month less than Openreach-only postcodes (INCA & Point Topic, 2025). Secure long-term value by re-contracting onto longer fixed-price plans (YouFibre, Trooli, Hyperoptic offer no in-contract price rises).

Long term (2028 to 2030)

The economics of broadband will pivot from build to take-up. With FTTP available to 90%+ of premises by 2028 on Ofcom's central forecast, providers will compete on bundles (mobile convergence, streaming, AI services) rather than headline speed. Households should reassess every two years whether 100 Mbit/s remains sufficient.

Benchmarks that should change these recommendations

If TAR26's final statement reduces wholesale FTTP price caps significantly, expect retail prices to fall a further 10 to 15% in real terms by 2028. If Openreach declares a definitive 30 million premises target with a date earlier than 2030, altnet consolidation pressure will intensify. If 5G Standalone reaches 90%+ outdoor coverage, FWA becomes a genuine fixed-line substitute for rural households. If Kuiper consumer pricing in 2026 lands materially below Starlink, the rural satellite market becomes a two-horse race for the first time.

SECTION 08 · PART 6 · CAVEATS

Caveats and data gaps.

QUICK ANSWER

Every quantitative claim in this report is sourced. Some series have methodology breaks that affect comparability. This section is the honest accounting of what is solid, what is estimated, and where data gaps remain.

- Ofcom changed its broadband speed measurement methodology three times (2018, 2019, 2023); pre-2018 mean and post-2023 average-maximum series are not directly comparable.
- ONS Internet Access - Households and Individuals series was discontinued in 2020; no equivalent UK-wide household penetration series exists for 2021 to 2024 except IBISWorld estimates.
- ThinkBroadband and Ofcom FTTP coverage figures regularly diverge by 3 to 5 percentage points due to definitional differences (ready-for-service versus operator-reported).
- Pre-2007 nominal price figures are inferred from contemporary Oftel/Ofcom market reports rather than a continuous Ofcom Pricing Trends series, which only begins in its current form in 2010.
- USO connection numbers are reported irregularly by BT (six-monthly); we have used the most recent published figure where available.
- Altnet figures from INCA and Point Topic count premises differently from ThinkBroadband (overlap treatment varies); both are flagged where used.
- Forecasts for 2026-2030 depend on Ofcom's Telecoms Access Review 2026 outcome and Project Gigabit delivery cadence. Quantitative forecast figures reflect documented commitments and BroadbandSwitch.uk's central projections, not industry consensus.
- Older speed data (2000 to 2007) is sparse; Oftel and early Ofcom publications are the primary sources, occasionally supplemented by BT and Cable contemporary press releases.
- Kuiper UK subscriber forecasts for 2026-2030 assume a successful commercial launch in 2026 and competitive pricing. If launch is materially delayed, these figures will need revision downward.
- Some Ofcom CSV data files were not directly retrievable at the time of writing due to server-side access controls; key figures have been verified via Ofcom's narrative PDFs and confirmed through third-party citations (ISPreview, Statista, ThinkBroadband).

SECTION 09 · REFERENCES · APA 7

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Every quantitative claim in this report is backed by a publicly verifiable source. References listed alphabetically in APA 7th edition format.

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SECTION 10 · ABOUT

About the author and BroadbandSwitch.uk.

Dr Alex J. Martin-Smith

Lead Editor · CMgr, MBA, LLM, DBA

Dr Alex J. Martin-Smith is the founder of BroadbandSwitch.uk and lead editor across BroadbandSwitch.uk, RightSpeed.co.uk, and UKSpeedTest.co.uk. Authority Report Volume I (this document) is part of a planned series providing UK consumers and policy researchers with a definitive sourced data reference on the British broadband market.

Adrian James

Reviewer

Independent reviewer of this Authority Report Volume I, with a focus on commercial accuracy and consumer fairness in UK telecoms reporting.

BroadbandSwitch.uk

BroadbandSwitch.uk is the UK's authoritative consumer data resource for fixed broadband. We track every metric that matters: coverage, speed, price, switching, complaints, and consumer outcomes, across all major providers and the altnet sector. Our data is sourced from primary regulator and operator publications, cross-checked, and updated in line with Ofcom's reporting cadence.

Sister sites

RightSpeed.co.uk - an 8-question UK broadband-speed-needs calculator that helps households right-size their plan before they overspend. Plain-English guidance, no signup, no ads.

UKSpeedTest.co.uk (branded Pulse) - a free, no-signup, ad-free UK broadband speed test that measures download, upload and jitter in under a minute.

BroadbandMap.org.uk - a postcode-level UK coverage map showing which technologies (FTTP, FTTC, cable, 4G, 5G) reach which streets.

Companion data

This report is accompanied by 20 CSV files (one per metric) plus a consolidated Excel master dataset. These files contain the full year-by-year data underpinning every chart and table in this report. Each datapoint is cited with its primary source. Available for download alongside this PDF.

BroadbandSwitch.uk is a trading name of SearchSwitchSave. Isle of Man company 030828B. UK IP registration UK00004211113. ICO IM registration R697728. Registered office Sycamore House, Glen Duff, Lezayre, IM7 2AT, Isle of Man.

SECTION 11 · OTHER PUBLICATIONS BY BROADBANDSWITCH.UK

Where to go next.

This Authority Report sits alongside three other BroadbandSwitch.uk publications that consumers, journalists, and policy researchers will find genuinely useful. All three are free, independent, no signup required.

RELATED REPORT · REGULATORY DATA

Connected Nations 2025: Our deep dive into Ofcom's annual data

Our companion read-through of Ofcom's Connected Nations 2025 report, published 19 November 2025. Covers UK fixed broadband coverage by technology, speed thresholds (decent, superfast, ultrafast, gigabit), FTTP availability and take-up, mobile and 5G coverage, and Ofcom's view of the digital divide and rural broadband. A useful primary-source companion to this Authority Report.

broadbandswitch.uk/reports/connected-nations-2025/

MONTHLY UPDATE · CONSUMER GUIDE

Best Broadband Deals UK: May 2026 update

Our monthly update on the live UK broadband deals market. Picks by household need (best overall, cheapest, fastest, full-fibre, TV bundles, broadband-only, no-contract, social tariffs, rural), the April price rises in pounds and pence, One Touch Switch in practice, and 21 sections of consumer guidance with live postcode-level comparison. Refreshed on the first working day of each month.

broadbandswitch.uk/best-broadband-deals-uk-may-2026.html

CONSUMER PROTECTION · STAYING SAFE ONLINE

Online Safety: Staying safe on UK broadband

Our consumer guide to online safety on UK broadband. Covers the Online Safety Act 2023 and its implementation through 2025-2026, content controls and parental filters, scam awareness and phishing, network-level safety features offered by major UK ISPs, and practical guidance for families, vulnerable users, and older households. Plain English, with sourced regulatory references throughout.

broadbandswitch.uk/online-safety/

Thanks for reading.

The UK broadband market in 2026 is the most competitive, fairest, and best-served it has ever been. Coverage is racing past 80%, prices are falling in real terms, switching has never been easier, and consumers have more genuine choice than at any time since the market opened in 2000. That is a good news story we are proud to track, chart, and share.

If this report has helped you understand the UK broadband market better, please share it with someone else who would find it useful. And if you have not run a postcode check in the last 18 months, this is a great moment to do one. You may be pleasantly surprised.

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