



**BT Regional Pricing 14/02/2025 – 25/03/2025**

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## Regional Pricing | Methodology

### 1 Postcode Level Data Capture

- FDM tracked a rotating selection of Postcodes across a 6-week period, with standalone broadband and broadband + landline consumer packages available online at each postcode captured twice during the period to allow for offer changes and over 200 postcodes per week
- Screenshots were taken for all packages to ensure robust methodology
- Postcodes were selected from a list provided to FDM by BT Group that included postcodes in Ofcom's WFTMR Area 2 and Area 3 as well as in 7 Case Study Areas where the majority of premises were covered by 3 networks based on BT's analysis.
- BT Group prepared the list of postcodes to ensure that pricing data is captured for the main network presence groups (e.g. VM, Cityfibre and No Openreach FTTP) in each area. Generally, more postcodes are allocated to network combinations that appear more frequently, although postcode allocations are not exactly proportional the breakdown of premises to ensure sufficient sample size for smaller network presence groups.
- For each network presence group, BT Group selected postcodes where the premise counts are closest to the UK-wide average number of premises per postcode (15), to ensure that they represented typical residential postcodes (as opposed to e.g. large buildings which may skew results).

1

### 2 Networks Present

- FDM checked both Retail ISP websites and Wholesale ISP websites / coverage checkers to confirm Network availability (e.g. Vodafone & CityFibre websites)
- FDM sourced data from a range of Altnets to ensure that a single Altnet could not skew averages, as well as a selection of Major ISP's (as defined by OFCOM)
- Sky had not been engaged in Regional Pricing when checks were commissioned and so they were excluded. Note: Since beginning this work FDM has observed Regional Pricing from Sky
- Where the networks present at a postcode differ from the data provided by BT Group, the relevant classifications of that postcode (no. of networks etc.) are amended accordingly

2

### 3 Average Monthly Costs & Average of Lowest Price

- Rather than compare headline prices which can be misleading due to 3-month-free type offers, FDM uses an Average Monthly Cost derived from Total Cost of Ownership divided by Contract Length (months)
- To ensure a fairer benchmarking structure, the Lowest Average Price per Speed Bracket per Postcode would then be selected (unless otherwise stated e.g. a Single Provider Comparison)

3

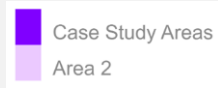
### 4 Speed Brackets

- FDM split packages into the following speed brackets to ensure fairer comparison: "Entry" (the lowest price of any provider for any product), 75-149, 150-400, 400-800, 800+Mbps
- Benchmarking has been made by speed and not Technology Type (e.g. DOCSIS vs FTTP vs FTTC).

4

# Regional Pricing | Postcode Data

Date Range: 6 weeks covering 14/02/2025 – 25/03/2025



**29** Distinct providers

**167** Area 2 Postcodes

**68** Area 3 Postcodes

**398** Case study city Postcodes

**93** Local UK Authorities

**671** Postcodes checked

**220** Postcodes checked twice on Weeks 1 and 4

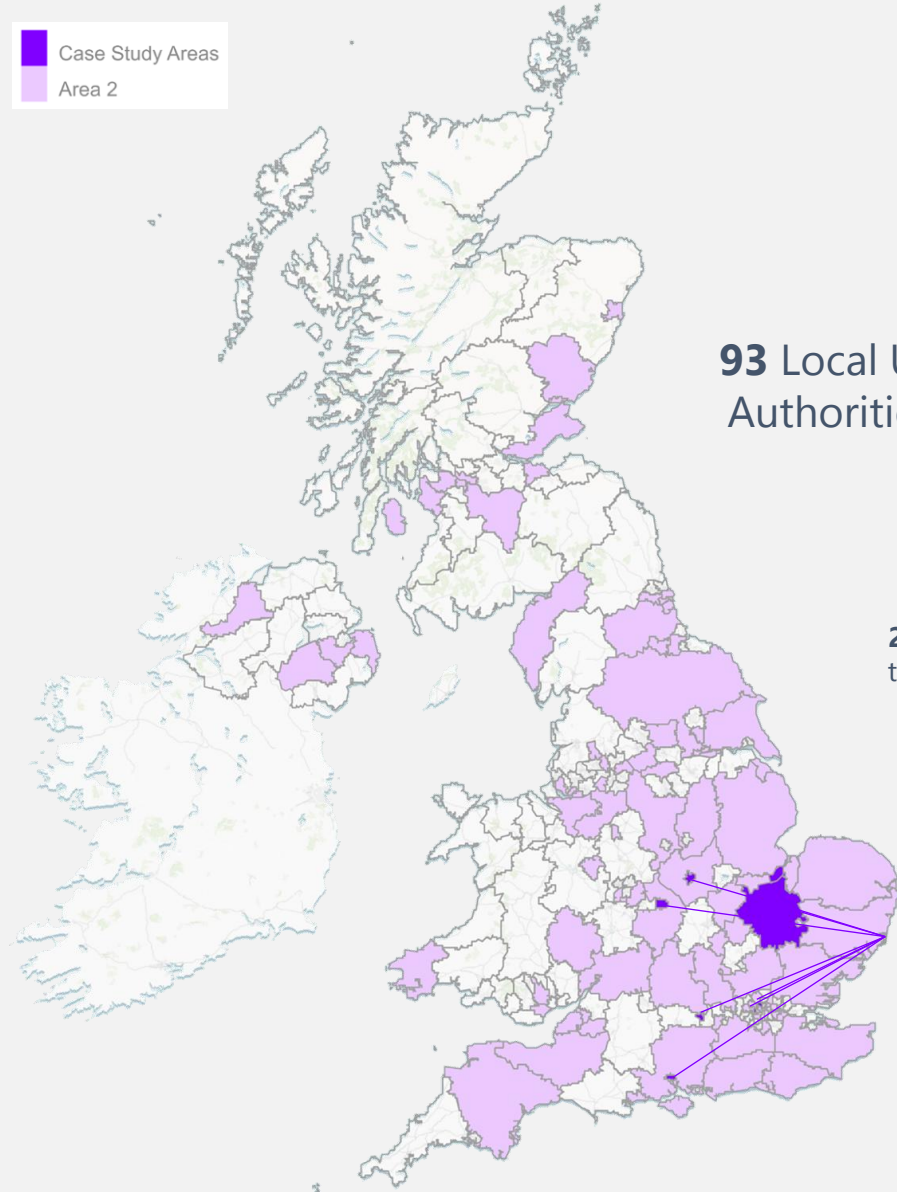
**225** Postcodes checked twice on Weeks 2 and 5

**226** Postcodes checked twice on Weeks 3 and 6

**69,182** Total packages recorded

**~320** Unique packages

At **752** distinct prices



**7** Case Study Cities

**1,729,550** data points

## Regional Pricing | Area 2 vs. Case Study Areas

Average of Minimum AMC across postcodes with [X] networks

> Area 2 Average of  
Min AMC< Area 2 Average of  
Min AMC

Average of Minimum AMC across postcodes with [X] networks	Area 2 [2]	Cambridge [3+]	Camden [3+]	Coventry [3+]	Hammersmith and Fulham [3+]	Leicester [3+]	Reading [3+]	Southampton [3+]	Case Study Average [3+]
Entry (i.e., any speed)	<b>£23.38</b>	£23.05	£19.03	£23.00	£14.51	£22.51	£21.47	£23.42	£22.55
75 to 149	<b>£23.70</b>	£23.05	£20.70	£23.00	£18.21	£23.13	£23.81	£23.99	£22.87
150 to 400	<b>£26.08</b>	£24.39	£19.72	£24.42	£15.15	£23.86	£22.65	£27.28	£23.90
400 to 800	<b>£31.15</b>	£30.34	£30.34	£30.11	£19.53	£29.61	£27.93	£32.15	£30.16
800+	<b>£34.02</b>	£25.42	£24.56	£26.26	£19.65	£24.90	£25.54	£24.56	£25.39

Price Savings Vs Area 2 [2]	Area 2 [2]	Cambridge [3+]	Camden [3+]	Coventry [3+]	Hammersmith and Fulham [3+]	Leicester [3+]	Reading [3+]	Southampton [3+]	Case Study Average [3+]
Entry (i.e., any speed)	-	£0.33	£4.35	£0.38	£8.87	£0.87	£1.91	-£0.04	£0.83
75 to 149	-	£0.65	£3.00	£0.70	£5.49	£0.57	-£0.11	-£0.29	£0.83
150 to 400	-	£1.69	£6.36	£1.66	£10.93	£2.22	£3.43	-£1.20	£2.18
400 to 800	-	£0.81	£0.81	£1.04	£11.62	£1.54	£3.22	-£1.00	£0.99
800+	-	£8.60	£9.46	£7.76	£14.37	£9.12	£8.48	£9.46	£8.63

- Southampton [3+] postcodes majorly consisted of a network configuration of Openreach FTTC, Virgin Media & Toob; Toob only offered a 900Mbps package during the case study driving an increase in the Average of min AMC in speed brackets <800Mbps

## As Network Availability Increased, the Average Minimum AMC for 150Mbps+ reduced

### Multi-Network Average Pricing vs Openreach Only Pricing

No. of postcodes	4+ Networks		3 Networks		Openreach + Altnet		Openreach FTTP + Virgin Media		Openreach FTTC + Virgin Media		Openreach Only (inc FTTC & FTTP Coverage)	
Average of minimum AMC per postcode by Speed bracket												
<b>Entry* (i.e. any speed)</b>	12	£16.08	173	£22.23	114	£22.31	55	£23.97	98	£23.96	153	£25.02
<b>75-149Mbps</b>	12	£21.82	171	£23.01	75	£24.81	55	£23.97	98	£23.96	56	£26.87
<b>150-399Mbps</b>	12	£16.23	173	£23.73	108	£23.47	55	£26.47	98	£28.29	56	£26.64
<b>400-799Mbps</b>	12	£20.70	172	£29.50	95	£28.67	55	£30.71	98	£33.33	56	£31.44
<b>&gt;800Mbps</b>	12	£22.91	173	£26.47	113	£29.11	55	£36.21	98	£36.80	56	£36.35

> OR Only Average

< OR Only Average

- Entry includes the average AMC of the cheapest package available at each postcode (across all speeds).
- CPs in Openreach FTTC postcodes only offer speeds below 75 Mbps. Therefore, the "Openreach only" prices for all speed tiers above 75 Mbps are based on Openreach FTTP postcodes only.

## Where OR & VM are available customers can save dependent on timing of promotions

OR + Virgin Media vs OR Only Average

### Openreach only (Any technology)

Minimum of AMC by Speed Bracket by postcode	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Weekly Average
<b>Entry</b>	£24.92	£25.05	£25.04	£25.43	£26.01	£25.50	£25.33
<b>75-149Mbps</b>	£26.44	£26.94	£26.99	£27.41	£26.99	£26.99	£26.96
<b>150-399Mbps</b>	£25.89	£26.48	£27.35	£27.17	£27.32	£27.25	£26.91
<b>400-799Mbps</b>	£30.39	£32.28	£31.10	£30.61	£32.86	£31.00	£31.37
<b>&gt;800Mbps</b>	£34.00	£35.95	£37.94	£38.21	£38.35	£38.49	£37.16

### Openreach (Any technology) + Virgin Media

Minimum of AMC by Speed Bracket by postcode	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Weekly Average	OR Only Average
<b>Entry</b>	£25.01	£25.07	£23.98	£23.97	£23.95	£23.96	£24.32	£25.33
<b>75-149Mbps</b>	£25.85	£25.99	£23.96	£23.94	£23.95	£23.96	£24.61	£26.96
<b>150-399Mbps</b>	£27.25	£27.20	£28.11	£28.11	£28.12	£28.15	£27.82	£26.91
<b>400-799Mbps</b>	£31.99	£32.62	£32.39	£32.64	£33.59	£32.47	£32.62	£31.37
<b>&gt;800Mbps</b>	£37.67	£37.31	£36.76	£36.71	£36.68	£36.93	£37.01	£37.16

> OR Only Average

< OR Only Average

## Customers with an Alt-Net Present can access 150-399Mbps for less than 17-74Mbps in OR Only Postcodes

3 Networks & OR + Alt-Net vs OR Only & OR + VM Average

### Openreach (Any technology) + Alt Net

Minimum of AMC by Speed Bracket by postcode	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Weekly Average	OR Only Average	OR + VM Average
<b>Entry</b>	£22.15	£22.55	£23.29	£21.52	£22.83	£23.54	£22.65	£25.33	£24.32
<b>75-149Mbps</b>	£24.27	£24.26	£25.00	£24.20	£25.27	£25.30	£24.72	£26.96	£24.61
<b>150-399Mbps</b>	£22.50	£23.82	£24.76	£22.00	£24.59	£25.03	£23.78	£26.91	£27.82
<b>400-799Mbps</b>	£27.15	£29.67	£29.87	£26.11	£30.51	£30.72	£29.01	£31.37	£32.62
<b>&gt;800Mbps</b>	£29.17	£30.65	£30.48	£27.62	£30.15	£30.39	£29.74	£37.16	£37.01

### 3+ Networks

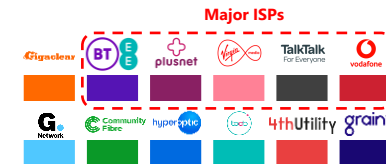
Minimum of AMC by Speed Bracket by postcode	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Weekly Average	OR Only Average	OR + VM Average
<b>Entry</b>	£22.02	£21.83	£22.14	£21.94	£21.77	£21.90	£21.93	£25.33	£24.32
<b>75-149Mbps</b>	£23.65	£23.60	£22.84	£23.03	£22.91	£22.97	£23.17	£26.96	£24.61
<b>150-399Mbps</b>	£23.08	£23.04	£24.15	£23.79	£23.82	£23.89	£23.63	£26.91	£27.82
<b>400-799Mbps</b>	£29.14	£28.96	£29.69	£29.70	£29.13	£29.22	£29.31	£31.37	£32.62
<b>&gt;800Mbps</b>	£29.07	£29.17	£25.97	£26.83	£26.61	£25.87	£27.25	£37.16	£37.01

> OR Only Average

< OR Only Average

# Hyperoptic offers the lowest priced packages when competing with other Alt-Nets

## Regional Pricing | Area 2 vs. Case Study Areas



### Openreach Only

	Area 2	Cambridge	Camden	Coventry	Hammersmith and Fulham	Leicester	Reading	Southampton
17 to 75	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99
75 to 149	£23.00	£26.00	£26.99	£26.00	£26.99	£26.99	£26.99	-
150 to 400	£24.00	£26.00	£27.00	£26.00	£26.00	£26.00	£26.00	-
400 to 800	£30.00	£30.00	£30.00	£30.00	£30.00	£30.00	£30.00	-
800+	£30.00	£30.00	£36.99	£30.00	£36.00	£36.00	£31.99	-

### Openreach + 1 Network (Majors only)

	Area 2	Cambridge	Camden	Coventry	Hammersmith and Fulham	Leicester	Reading	Southampton
17 to 75	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99
75 to 149	£22.99	£23.00	£23.99	£23.00	£23.99	£23.00	£23.00	£23.99
150 to 400	£24.00	£24.00	£26.00	£24.00	£26.00	£24.00	£24.00	£27.99
400 to 800	£29.99	£30.00	£30.00	£30.00	£30.00	£30.00	£30.00	£32.99
800+	£29.00	£29.00	£36.00	£29.00	£36.00	£29.00	£29.00	£36.99

### Openreach + 2+ Networks (Majors only)

	Area 2	Cambridge	Camden	Coventry	Hammersmith and Fulham	Leicester	Reading	Southampton
17 to 75	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99
75 to 149	£23.00	£23.00	£23.99	£23.00	£23.99	£23.00	£23.00	£23.99
150 to 400	£24.00	£24.00	£27.99	£24.00	£27.99	£24.00	£24.00	£26.00
400 to 800	£30.00	£30.00	£32.99	£30.00	£32.99	£30.00	£30.00	£30.00
800+	£29.00	£29.00	£36.99	£29.00	£36.99	£29.00	£29.00	£31.99

### Openreach + 1 Network (All providers incl. Altnets)

	Area 2	Cambridge	Camden	Coventry	Hammersmith and Fulham	Leicester	Reading	Southampton
17 to 75	£24.99	£18.00	£24.99	£24.99	£24.99	£24.99	£20.00	£24.99
75 to 149	£19.00	£23.00	£23.99	£23.00	£19.00	£23.00	£23.00	£23.99
150 to 400	£14.00	£15.75	£12.00	£24.00	£12.00	£24.00	£19.25	£27.99
400 to 800	£16.63	£17.50	£14.25	£28.50	£14.25	£30.00	£22.50	£32.99
800+	£21.00	£22.50	£15.75	£25.00	£15.75	£25.00	£25.00	£25.00

### Openreach + 2 Networks (All providers incl. Altnets)

	Area 2	Cambridge	Camden	Coventry	Hammersmith and Fulham	Leicester	Reading	Southampton
17 to 75	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99	£24.99
75 to 149	£19.00	£23.00	£16.63	£23.00	£16.63	£23.00	£23.00	£23.99
150 to 400	£8.75	£24.00	£12.00	£24.00	£12.00	£17.41	£12.00	£26.00
400 to 800	£13.13	£28.50	£14.25	£28.50	£14.25	£22.74	£14.25	£30.00
800+	£15.75	£25.00	£15.75	£25.00	£15.75	£23.74	£15.75	£25.00








### Openreach + 3 Networks (All providers incl. Altnets)

	Area 2	Cambridge	Camden	Coventry	Hammersmith and Fulham	Leicester	Reading	Southampton
17 to 75	-	-	-	-	£24.99	£24.99	£24.99	£24.99
75 to 149	-	-	-	-	£19.00	£23.00	£23.00	£23.99
150 to 400	-	-	-	-	£12.00	£17.41	£16.49	£12.00
400 to 800	-	-	-	-	£14.25	£22.74	£20.99	£14.25
800+	-	-	-	-	£15.75	£24.16	£22.49	£15.75

# Hammersmith & Fulham

14/02/2025 – 07/03/2025

**Package Name**  
 Most Common AMC  
 Alternative AMC  
if regional discounts  
 # of postcodes  
where most common tariff available in Hammersmith & Fulham

							
<b>Lowest AMC (Entry)</b>	Fibre (Plusnet) £24.99 <del>£25.99</del> 17-74Mbps	M125 Fibre Broadband £23.99 - 75-149Mbps	Fibre 1 £25.00 - 17-74Mbps	Full Fibre 65 £27.00 - 75-149Mbps	Superfast Fibre - 150Mb £16.00 £12.25   £14.00   <del>£26.17   £28.33</del> 150-399Mbps	100 Mbps Full Fibre Broadband £19.00 - 75-149Mbps	Ultrafast £22.00 - 75-149Mbps
<b>17-74Mbps</b>	Fibre (Plusnet) £24.99 <del>£25.99</del> Postcodes: 58 of 59	M50 Fibre Broadband £48.00 - Postcodes: 20 of 20	Fibre 1 £25.00 - Postcodes: 36 of 55	Fibre 65 £28.00 - Postcodes: 46 of 46	Fast Fibre - 50Mb £31.67 £25.29   £28.33 Postcodes: 9 of 12		
<b>75-149Mbps</b>	Full Fibre 145 (Plusnet) £26.99 - Postcodes: 5 of 5	M125 Fibre Broadband £23.99 - Postcodes: 20 of 20		Full Fibre 65 £27.00 - Postcodes: 6 of 6		100 Mbps Full Fibre Broadband £19.00 - Postcodes: 10 of 10	
<b>150-399Mbps</b>	Full Fibre 300 (Plusnet) £28.99 <del>£29.99</del> Postcodes: 5 of 5	M250 Fibre Broadband £28.99 - Postcodes: 20 of 20	Full Fibre 150 £27.00 - Postcodes: 5 of 5	Full Fibre 150 £28.00 - Postcodes: 6 of 6	Superfast Fibre - 150Mb £16.00 £12.25   £14.00   £26.17   £28.33 Postcodes: 5 of 17	300 Mbps Full Fibre Broadband £21.00 - Postcodes: 10 of 10	Ultrafast £23.21 - Postcodes: 5 of 5
<b>400-799Mbps</b>	Full Fibre 500 (Plusnet) £31.99 <del>£32.99</del> Postcodes: 4 of 5	M500 Fibre Broadband £33.99 - Postcodes: 20 of 20	Full Fibre 500 £30.00 - Postcodes: 5 of 5	Full Fibre 500 £35.00 - Postcodes: 6 of 6	Ultrafast Fibre - 500Mb £19.00 £14.88   £16.63   £30.54   £32.71 Postcodes: 5 of 17		
<b>800Mbps+</b>	Full Fibre 900 (BT & EE) £36.99 <del>£40.99</del> Postcodes: 4 of 5	Gig1 Fibre Broadband £36.99 - Postcodes: 20 of 20	Full Fibre 910 £36.00 - Postcodes: 5 of 5	Full Fibre 900 £42.00 - Postcodes: 6 of 6	Hyperfast Fibre - 1Gb £24.00 £16.63   £21.00   £34.92   £37.08 Postcodes: 5 of 17	1 Gbps Full Fibre Broadband £25.00 - Postcodes: 10 of 10	Gigafast £28.63 - Postcodes: 5 of 5

\* AMC's taken from 3 weeks of data, adjusted for price/promotion changes unrelated to regional variation

\*\* Postcode count indicates (the number of postcodes offering the respective package at the most common AMC) of (number of postcodes the respective provider offered a package in that speed bracket)

# Virgin Media employs different Regional Strategies in varying premises

Regional Pricing | Virgin Media Strategy

## Average Monthly Cost

Source: FDM Regional Pricing (17/03/2025)

◆ **£48.00**

Includes all Average Monthly Prices for Virgin Media per package.  
**Bold = the most common price**

◆ £38.99  
◆ **£36.99**

◆ £35.99  
◆ **£33.99**  
◆ £32.99

◆ £30.99  
◆ £29.99  
◆ **£28.99**  
◆ £27.99

◆ **£29.99**  
◆ £28.99  
◆ £27.99

◆ **£23.99**



**M50 Fibre Broadband**

Broadband Only



**M125 Fibre Broadband**

Broadband Only



**M250 Fibre Broadband**

Broadband Only



**M350 Fibre Broadband**

Broadband Only



**M500 Fibre Broadband**

Broadband Only



**Gig1 Fibre Broadband**

Broadband Only

**Gig1 Fibre Broadband**

1130Mbps  
Blazing-fast speed for busy households gaming and streaming at the same time  
✓ WiFi guarantee

Price  
No price rise in 2025 **£42.49** from April 2026 bill

**£38.99 a month**  
Add to basket  
[Find out more](#)

**Gig1 Fibre Broadband**

1130Mbps  
Blazing-fast speed for busy households gaming and streaming at the same time  
✓ WiFi guarantee

Price  
No price rise in 2025 **£40.49** from April 2026 bill

**£36.99 a month**  
Add to basket  
[Find out more](#)

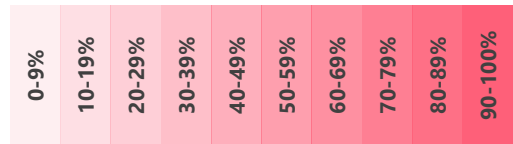
Virgin Media Gig1 Fibre Broadband

Regional Pricing Variation Examples

Virgin Media Packages									
	Area 2	Cambridge	Camden	Coventry	Hammersmith and Fulham	Leicester	Reading	Southampton	Total Average
M50	£48.00	£48.00	£48.00	£48.00	£48.00	£48.00	£48.00	£48.00	<b>£48.00</b>
M125	£23.99	£23.99	£23.99	£23.99	£23.99	£23.99	£23.99	£23.99	<b>£23.99</b>
M250	£28.92	£28.99	£28.99	£28.79	£28.99	£28.99	£28.99	£29.24	<b>£28.99</b>
M350	£29.82	£29.99	£29.99	£29.59	£29.99	£29.99	£29.99	£29.66	<b>£29.88</b>
M500	£33.99	£33.99	£33.99	£33.99	£33.99	£33.99	£33.99	£33.82	<b>£33.97</b>
Gig1	£37.19	£36.99	£36.99	£37.39	£36.99	£36.99	£36.99	£37.32	<b>£37.11</b>
Gig2	£84.00	£84.00	-	£84.00	-	-	-	-	<b>£84.00</b>

# Regional Pricing | TalkTalk & Vodafone Price Matrix

% of Total Packages Offered At a Speed/Price Point per ISP



openreach		TalkTalk For Everyone			
	Full Fibre 65	Full Fibre 150	Full Fibre 500	Full Fibre 900	
£42.00				100%	
£39.95					
£35.00			100%		
£34.00					
£28.00		100%			
£27.00	100%				

CityFibre		TalkTalk For Everyone			
	Full Fibre 65	Full Fibre 150	Full Fibre 500	Full Fibre 900	
£42.00				12.96%	
£39.95				87.04%	
£35.00			12.96%		
£34.00			87.04%		
£28.00		100%			
£27.00	100%				

**Standard Broadband Only packages:**

- Full Fibre 65
- Full Fibre 150
- Full Fibre 500
- Full Fibre 900

openreach		vodafone			
	Full Fibre 74/80	Full Fibre 150	Full Fibre 500	Full Fibre 910	
£38				100%	
£31					
£30			100%		
£29					
£27		100%			
£26	100%				
£25					
£23					

CityFibre		vodafone			
	Full Fibre 74/80	Full Fibre 150	Full Fibre 500	Full Fibre 910	
£38.00					
£31.00			100%		
£30.00					
£29.00				100%	
£27.00					
£26.00					
£25.00		100%			
£23.00	100%				

**Standard Broadband & Phone packages:**

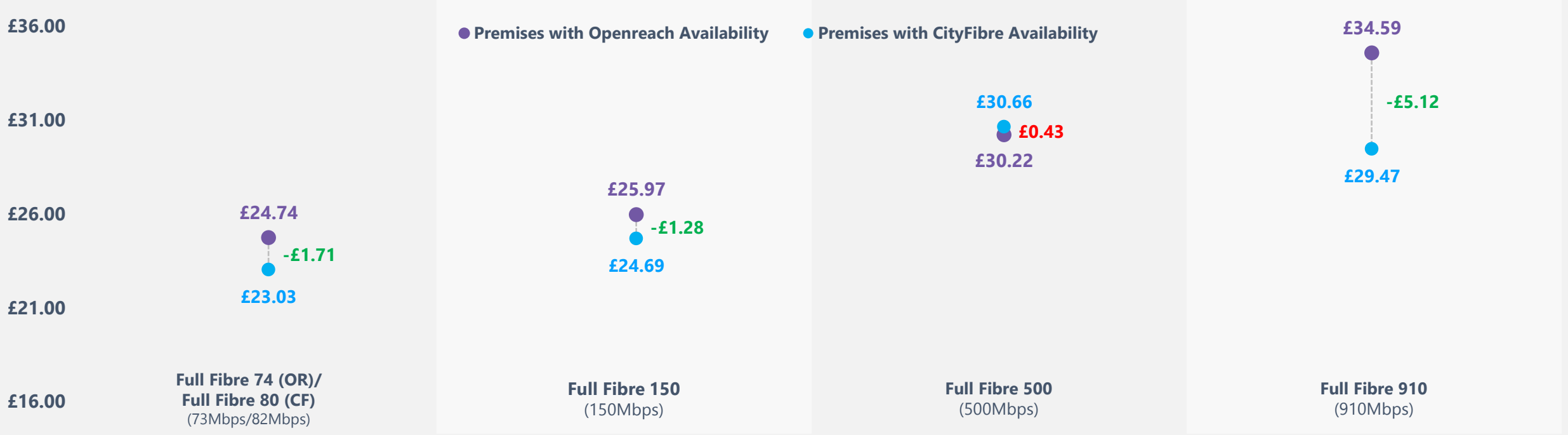
- Fibre 1
- Fibre 2
- Full Fibre 74
- Full Fibre 80
- Full Fibre 150
- Full Fibre 500
- Full Fibre 910

# Full Fibre 910 in CFH Postcodes undercuts Full Fibre 500 and is an average of £5.12 cheaper than OR postcodes

Trended Pricing Benchmark | CityFibre vs. Openreach

Date Collected: 31/03/2025

**24-month Full Fibre Broadband & Phone packages** Average of Average Monthly Costs

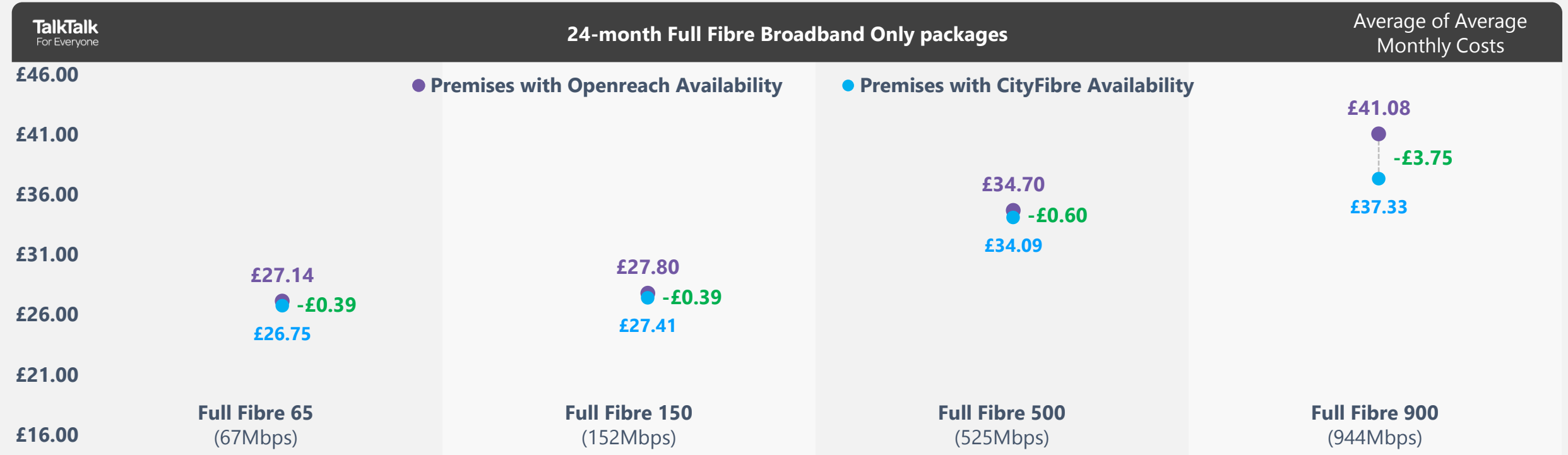


Pricing in Cityfibre vs Openreach areas	Full Fibre 74 (OR) / Full Fibre 80 (CF)	Full Fibre 150	Full Fibre 500	Full Fibre 910
Minimum Pricing Variation	-£1.22 20/02/2025	-£1.22 20/02/2025	£0.00 20/02/2025 – 28/02/2025	-£3.66 20/02/2025
Maximum Pricing Variation	-£2.00 24/03/2025	-£1.33 24/03/2025	+£0.67 24/03/2025	-£6.00 24/03/2025

# Full Fibre 900 in CFH Postcodes is an average of £3.75 cheaper than OR postcodes, less than Vodafone's discount

Trended Pricing Benchmark | CityFibre vs. Openreach

Date Collected: 31/03/2025



Pricing in CityFibre vs Openreach areas	Full Fibre 65	Full Fibre 150	Full Fibre 500	Full Fibre 900
Minimum Pricing Variation	£0.00 07/03/2025-31/03/2025	£0.00 07/03/2025-31/03/2025	-£0.57 28/02/2025	-£1.22 24/03/2025
Maximum Pricing Variation	-£1.17 20/02/2025	-£1.17 20/02/2025	-£0.64 31/03/2025	-£8.76 20/02/2025



# Thank You

For Questions and Further Support, please reach out to [requests@fdm.uk](mailto:requests@fdm.uk)