# Communications Market Report 2026

Welsh version available

**Report**

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## Section

# Overview

The Communications Market Report (CMR) is an interactive data portal, which allows users to interrogate data collected from industry by Ofcom, data from Ofcom's consumer research, and headline figures from selected third parties.

Commentary and analysis of much of the data used in the CMR can be found in our Media Nations, Online Nation and Connected Nations reports, where we review and explore specific sectors of the media and communications markets in detail.

In this short document, we highlight some key findings revealed by our most recent data.

# Key findings

## Telecoms

- **The UK telecoms sector generated £34.7bn in revenue in 2025**, a year-on-year decrease of £0.3bn (0.8%). Retail fixed and mobile services generated £14.9bn and £14.5bn in revenue respectively, both down year-on-year, with wholesale fixed and mobile services making up the remaining £5.3bn. Mobile services accounted for 49.4% of total retail revenues in 2025, up by 0.2pp compared to 2024.
- **There were 29.3 million UK fixed broadband connections at the end of 2025**, an increase of 126,000 compared to 2024. 42% of broadband connections were provided using full fibre at the end of 2025, up 11pp YoY, as the number of full fibre lines increased by 3.4 million (38%) to 12.3 million. The number of fibre-to-the-cabinet (FTTC) connections fell in 2025 (down by 2.6 million to 9.9 million), while the number of ADSL lines fell by over a quarter to 1.3 million.
- **Average monthly data use per residential fixed broadband connection (including uploads and downloads) was 583 GB in July 2025.** This represented a 52 GB per month (10%) increase compared to the 531 GB average a year previously.
- **At the end of 2025, there were 21.4 million UK fixed voice connections,** a year-on-year decrease of 2.8 million (12%). While the number of PSTN/emulated PSTN lines and ISDN channels continued to decline during the year, the number of 'other' lines (mainly managed VoIP connections) increased by 1.4 million (12%) to 12.9 million. This was due to growing take-up of full fibre broadband services and voice services using VoIP over a broadband connection.
- **Outgoing fixed and mobile voice call volumes both continued to decline in 2025.** Total fixed and mobile call volumes fell by 12 billion minutes (7%) to 164 billion minutes in 2025. Outgoing calls from fixed lines fell by 19% to 15 billion minutes during the year, while call volumes from mobile phones fell by 6% to 149 billion minutes. 91% of call volumes originated on mobile networks in 2025, up from 90% in 2024.
- **There were 123 million UK mobile subscriptions at the end of 2025,** up 4% year-on-year. The largest percentage increase was for machine-to-machine (M2M) subscriptions[1] (up by 15% or 4.1 million subscriptions).
- **82% of mobile subscriptions were post-pay in 2025, up one percentage point year-on-year.** The total number of post-pay subscriptions increased by 6% to 101 million during the year, while the number of pre-pay subscriptions fell by 3% to 22 million.
- **Average monthly data volumes per mobile data user increased by 1.1 GB (11%) to 11.8 GB per month in 2025.** Across all mobile users, average monthly data consumption was 10.7 GB, also representing a year-on-year increase of 11%.

[1] An M2M (Machine-to-Machine) subscription is a mobile connection that enables devices to communicate with each other over a mobile network. Examples include Smart meters (energy, water, gas reporting data back to utilities), Tracking devices (fleet management, logistics) and payment terminals (sending sales/transaction data).

- **Average monthly call minutes and messages per mobile subscription both continued to fall in 2025.** Average outgoing call volumes per subscription fell by 6% to 146 minutes per month, while average outgoing messages per subscription fell by around a quarter to 21 per month. While average monthly post-pay customer call use (164 minutes) was almost double that of pre-pay customers (84 minutes), average monthly messages per post-pay and pre-pay subscriber were the same (21 messages).

# Television and audiovisual

- **Total UK commercial TV and online video sector revenues reached £16.5bn in 2025,** a nominal increase of 6% year-on-year. However, this headline growth continues to mask substantial variation across different parts of the market, with online segments driving expansion while revenues from TV broadcasters remain under pressure.
- **Pay TV remained the largest single component of the market**, with revenues rising from £5.99bn to £6.22bn (includes the subscription revenues of TV subscription providers such as Sky and Virgin Media). This growth suggests some stabilisation following earlier declines, driven by price increases and bundled offerings. However, underlying subscriber trends remain challenging, with traditional pay TV household penetration declining by 3 percentage points year-on-year to 30% in Q1 2026.[2]
- **Broadcaster Video-on-Demand (BVoD) revenues increased to £1.15bn in 2025 (up 8% year-on-year)** and now account for 29% of total TV advertising revenue in the UK. In contrast, linear TV advertising revenues declined from £3.13bn to £2.81bn (down by 10%).
- **Spend on first-run UK-originated programming by Public Service Broadcasters (PSBs) fell from £2.8bn in 2024 to £2.6bn in 2025 (down 6%), reflecting more constrained commissioning conditions following a sports-driven uplift in 2024.** The 2024 increase was driven by a strong cycle of major international sporting events, including the Men's UEFA Euro 2024 and the Paris Olympic and Paralympic Games. Excluding sports, first-run UK-originated spend increased by 2% in 2025, indicating relative resilience of investment across most other genres.
- **Total first-run originated hours increased by 3% in 2025,** rising to just over 31,400 hours. This marks a stabilisation following two consecutive years of declining output, although volumes remain below pre-pandemic levels.
- **There was an increase in programming expenditure from multichannel broadcasters across key genres (Sport, Entertainment, Films, News, Factual, Children's, Leisure and Music) in 2025.** Programming spend increased from £4.6bn to £4.8bn, while spend on sports channels increased to £3.5bn in 2025 (up 5% year-on-year), reinforcing the central role of premium sports rights for pay-TV.
- **UK SVoD revenue exceeded £5.17bn in 2026, up 18% year-on-year.** As net subscriber growth has slowed, price increases, bundling and advertising tiers are driving revenue growth.

[2] Barb Establishment Survey Q1 2026, traditional pay TV includes households with a Sky or Virgin subscription

- **Third-party contributions to PSB original programming increased in 2025,** rising from £677m in 2024 to £748m. As a result, third-party funding accounted for a higher share of total PSB investment, reinforcing its importance in financing UK-originated content.
- **Total video viewing saw a larger decline in 2025 than recent years,** falling 7 minutes to 4 hours and 23 minutes per person per day. This was driven primarily by the continued fall in live viewing of broadcast TV, which was down 12 minutes to 1 hour and 30 minutes. Broadcast content (including live, recorded playback and broadcaster video-on-demand) made up 53% of in-home video viewing in 2025, compared to 56% in 2024, with individuals watching for an average 2 hours and 19 minutes per day, down 11 minutes year-on-year. Once again, broadcaster video-on-demand (BVoD) saw growth, increasing by 6 minutes on average per day. The most notable gains were among viewers aged 55+.
- **Average weekly reach of broadcast TV continued to decline overall** (among UK population 4+), going from 74% in 2024 down to 70% in 2025), and particularly among younger viewers. Those aged 16-24 saw the sharpest decline, with total broadcast TV reach down 6 percentage points in 2024 to 39%, while it remained relatively flat among those aged 75+ at 95%.
- **BBC remained the most-watched service overall,** accounting for 46% of total in-home video viewing across all devices. However, for all age groups under 34, Netflix was the most watched service. Among 16-34s, Netflix and TikTok took first and second place and the BBC fell to third position. Among children aged 4-15, Netflix ranked first, while the BBC came second and TikTok third.

## Radio and audio content

- **Almost nine in ten (87%) UK adults aged 15 and over tuned into the radio in an average week in Q1 2026**, listening for an average of 19.9 hours per week**.** While stable compared to last year, both reach and hours are down compared to 2024.
- **Commercial radio stations continue to account for the majority of listening (54.3% of weekly hours),** while the BBC still has the greatest share of any single UK broadcaster (43.4% of weekly hours, compared with Global's 25.2% and Bauer's 18.8%) across all platforms, i.e., DAB, AM/FM and online, including smart speakers.
- **The majority of radio listening is still through an AM/FM or digital (DAB/DAB+) set**, accounting for 67% of all radio listening hours. DAB's share of listening (now 43%) has remained relatively steady, while AM/FM's share of listening (24%) continues to decline. Meanwhile, online listening continues to increase steadily, up by 6 percentage points in the last three years from 24% in Q1 2023 to 30% in Q1 2026. Smart speakers alone now account for 19% of radio listening, up 5 percentage points from three years ago.
- **Total commercial radio relevant turnover (i.e., revenue associated with broadcasting) was £674m in 2025, up from £651m in 2024.** National advertising revenues continued to outperform local, extending a longer-term structural shift in the market.

# Online

- **UK adults spend an average of four and a half hours online a day in 2025 – up by 10 minutes from 2024.** 95% of the UK 16+ population have access to the internet at home and the average time spent per day online on personal (i.e., not work) smartphones, tablets and computers in May 2025 was 4 hours and 30 minutes.[3]
- **Half (51%) of time spent online by UK adults in 2025 was on services owned by Alphabet or Meta.** YouTube remained the most-used Alphabet-owned service, used by 94% of adult internet users in May 2025. Time spent on YouTube also increased, reaching an average of 51 minutes a day (not including the TV set), compared to 47 minutes in 2024. Google Search was used by 82% of online adults in the month.[3]
- **WhatsApp was the most-used messaging service in 2025.** On average, 74% cent of UK online adults accessed WhatsApp each day in May 2025, up from 64% in May 2024. Facebook Messenger was used by 23% each day, down from 30% in 2024[3]
- **97% of online adults visited a news service in May 2025, spending an average of 10 minutes on these services per day**, level with 2024. The BBC was the most-visited brand with a news service, used by 77% of UK online adults in a month.[3]
- **Around a third (35%) of UK adult internet users report that they feel the internet is 'good for society',** with around half remaining neutral (47%) and just under a fifth (18%) reporting that the internet is 'damaging society'. Despite this, two-thirds (66%) believe that the benefits of being online outweigh the risks.[3]
- **Almost all 8-17-year-olds are online (99%) and most (78%) have their own mobile phone - with ownership rising steeply between age 10 and 11 (56% to 83%).** The mobile phone was the most common device children use to go online (77% among those who go online) - six in ten (59%) used a tablet, and 55% used a games console. Watching video content (89%) and gaming online (72%) were among the most popular online activities for children (aged 8-17). [4]
- **Children aged 8-14 spent on average 3 hours 36 minutes a day in October 2025 to March 2026 across smartphones, tablets or computers**. Of this time, 1 hour and 59 minutes were spent on social media or video sharing services. Children spent the most time on YouTube (49 minutes a day, equating to 23% of daily online activity) followed by Snapchat (39 minutes, 18% of their daily online activity). Average time spent online increases with age - older children (15-17-year-olds) spent on average 6 hours 20 minutes a day.[5]
- **Almost four in ten (37%) 8-17s say they think they spend too much time on screens. This increases from 28% among 8-9s to 44% of 16-17s.** Over half (55%) of parents of 8-17s say they think their child's screen time is too high, rising from 49% of parents of 8-9s to 57% of parents of 13-17s**.** However, many parents report that being online helps their children with

[3] Online Nations Report 2025
[4] Children's Online Experiences Report, May 2026. It compares findings from two waves of our Children's Online Safety Tracker (COST) survey: Wave 1 between March and April 2025 and Wave 2 between November and December 2025
[5] Children's Passive Online Measurement 2026 (Fieldwork between October 2025 and March 2026)

their schoolwork/homework (53%) and developing skills with reading and numbers (48%).[6]

**Updated online data for 2026 will be added to the interactive report alongside the publication of Online Nation in the autumn.**

# Post

- **Seven in ten adults (73%) say they have sent an item of post in the last month.** Of these, 4 in 10 (42%) say they have sent fewer than three items of post in the past month. Nine in ten (93%) say they have received an item in the post in the last week.
- **Overall letter volumes (including election mail) have continued to decrease, but this decline has slowed, with addressed letters volumes reaching 6.5 billion in 2024.** This is a 4.9% decrease year-on-year compared with a 8.3% fall in 2023. Access bulk mail again accounted for the majority (69.7%) of letters sent in 2024 (4.5 billion items), with its share of volumes down by 0.2 percentage points year-on-year. Access bulk mail volumes were down 5.3% year-on-year, as were Royal Mail end-to-end addressed letter volumes (which totalled 2.0 billion).
- **Just under two-thirds of people (62%) in the UK aged 16 and over consider post to be essential or fairly important as a channel of communication with friends and family.** Those aged 55+ are more likely to say that post is important to them (67%) as are those who are unable to leave the home without assistance (72%). However, post is considered less important than other ways of communicating with friends and family. Around 6 in 10 UK consumers (62%) describe it as an essential or fairly important channel. Comparatively, 9 in 10 (92%) consider phone calls to be essential or fairly important, and a similar proportion (90%) say the same for text messages.
- **Eight in ten adults (80%) say that they are satisfied with Royal Mail's service overall,** with a similar proportion (83%) satisfied with the quality of delivery to their home.

  **In 2025, four in ten (39%) rated Royal Mail's First Class service as good value for money, in line with 2024 (41%).** For Second Class, around 6 in 10 adults (58%) considered it good value for money, up from 54% in 2024.

  **New data on postal volumes and revenues will be added to the interactive report in the autumn.**

[6] Children and parents: Media use and attitudes Report 2026 (Fieldwork between November 2025 and February 2026)

# The interactive data

The Communications Market Report interactive data can be accessed here:

https://www.ofcom.org.uk/research-and-data/multi-sector-research/cmr

There are six sections in the report: data covering the communications and media sectors as a whole, television and audiovisual, radio and audio, telecommunications, online and post. Below we set out what can be found in each section.

## Market in context

This section contains data on:

- Advertising spend across the communication and media sectors
- Consumer research on the affordability of communications services
- Device and service take-up and use
- Affordability issues across communication and media sectors

## Television and audiovisual content

This section contains data on:

- TV broadcaster revenues
- Hours and spend on content for commercial TV broadcasters
- Hours and spend for the public service broadcasters, for network and regional services
- TV viewing, including reach, share and average minutes per day.
- Production sector revenue trends
- Consumer research on the use of, and attitudes towards, video on-demand (VoD) services
- VoD services, catalogues and revenues
- The use of social video platforms among children and adults

## Radio and audio content

This section contains data on:

- Radio broadcaster revenues
- Radio listening, including reach and share
- Community radio revenues and expenditure
- Consumer research about audio and podcast use and attitudes

# Telecommunications

This section contains data on:

- Telecommunications data revenues, volumes and market shares
- Online Communication Services (OCS) active users and volumes (to be updated in summer 2026)
- Average monthly spend data
- Home Broadband performance data
- Consumer research from our technology tracker
- Consumer research from our customer satisfaction tracker

# Online

This section contains data on:

- Use of apps and websites, including reach, time spent and use on different devices
- People’s attitudes to, and experiences of, using online services, including potentially encountering harm online from our Online Experiences Tracker consumer research
- Users’ experience of harmful content, awareness of safety measures and reporting measures on video sharing platforms from our Video Sharing Platforms Tracker consumer research (to be updated in summer 2026)
- Take up and use of internet connectivity, including reasons for not being online, from Ofcom’s Technology Tracker consumer research (to be updated in summer 2026)

It also includes insights on children’s online use:

- From the Children’s Online Safety Tracker Wave 2, covering children aged 8–17’s happiness online, the proportion of 11–17s encountering harm, and actions taken
- From the Children's Passive Online Monitoring 2026 study examining apps and websites used by children aged 8–14 and time spent
- Media literacy and online wellbeing, including how children use online services to support wellbeing, perceived benefits of being online, and attitudes to screen time from Children and Parents: Media Use and Attitudes, 2026.

# Post

This section contains data on:

- Consumer research data from our residential and business postal tracker
- Post volumes and revenues (to be updated in autumn 2026)