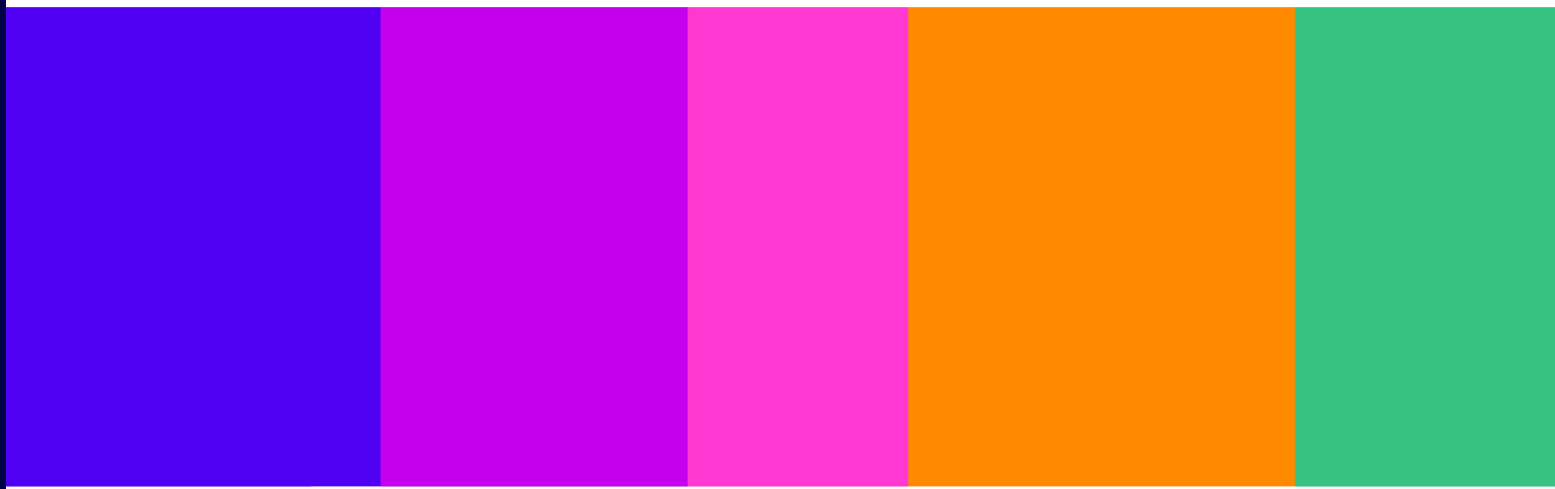


Telecommunications Market Data Update

Q1 2026

Report

Published 23 July 2026



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1. Market Monitor

In the following section we highlight some of the key trends emerging this quarter from the data we collect on the UK telecommunications sector.

Fixed services

- UK fixed voice service revenues totalled £891.9m in Q1 2026; a decrease of £49.5m (5.3%) from the previous quarter and a decrease of £194.2m (17.9%) year-on-year.
- The total number of fixed lines (including PSTN lines, ISDN channels and managed VoIP connections) fell by 757k (3.5%) during the quarter to 20.7 million.
- Total fixed-originated call volumes decreased by 583 million minutes (14.9%) year on year, to 3.32 billion minutes.
- There were 29.4 million fixed broadband lines at the end of Q1 2026, an increase of 282k (1.0%) year on year.

Mobile services

- Mobile telephony services generated £3.57bn in retail revenues in Q1 2026, a £55.6m (1.6%) increase from a year previously.
- Average monthly retail revenue per subscriber was £13.10 in Q1 2026, with post-pay subscribers generating more revenue than pre-pay users (averaging £15.54 compared to £5.40 for pre-pay).
- The number of active mobile subscriptions (excluding M2M) was 90.6 million at the end of Q1 2026, up 881k (1.0%) from the year before.
- Over the same period, the number of dedicated mobile broadband subscriptions increased by 421k (8.8%) to 5.2 million.
- The number of mobile-originated voice call minutes declined by 1.76 billion (4.6%) to 36.34 billion minutes year-on-year, with calls to landlines decreasing by 7.2% to 6.07 billion minutes.
- The number of mobile messages (including SMS and MMS) saw a year-on-year decline, down 1.25 billion messages (21.3%) to 4.61 billion.
- Data usage increased, with volumes up 351 PB (13.1%) year-on-year to 3042 PB.

2. Fixed Telecoms market data tables

Q1 2026 (January to March)

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Note: The data in these tables is the most accurate currently available. Where historical restatements have occurred, this is due to either operator restatements or improvements in methodology.

Table 1: Summary of network access & call revenues (£millions)

	All Operators	BT	Virgin Media	Other	BT Share
Access & calls¹					
2024	4,812	2,416	747	1,649	50.2%
2025	4,064				
2025 Q1	1,086				
2025 Q2	1,042				
2025 Q3	994				
2025 Q4	941				
2026 Q1	892				
Access¹					
2024	4,442	2,293	723	1,426	51.6%
2025	3,746				
2025 Q1	1,000				
2025 Q2	962				
2025 Q3	918				
2025 Q4	867				
2026 Q1	825				
Calls					
2024	371	123	25	223	33.1%
2025	318				
2025 Q1	86				
2025 Q2	80				
2025 Q3	77				
2025 Q4	75				
2026 Q1	67				

Notes: Excludes VAT. ¹. Revenue figures are not intended to include subscription revenues for internet access although some element may remain.

Table 2: Summary of exchange line numbers at end of quarter (000's)

	All Operators	BT	Virgin Media	Other	BT Share
2024	24,283	8,111	3,480	12,691	33.4%
2025	21,434				
2025 Q1	23,568				
2025 Q2	22,865				
2025 Q3	22,061				
2025 Q4	21,434				
2026 Q1	20,678				

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

	All Operators	BT	Virgin Media	Other	BT Share
2024	18,011	7,514	1,854	8,643	41.7%
2025	14,504				
2025 Q1	3,903				
2025 Q2	3,608				
2025 Q3	3,479				
2025 Q4	3,515				
2026 Q1	3,320				

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls ¹
2024	371	106	51	113	103
2025	318	95	47	93	85
2025 Q1	86	25	13	25	24
2025 Q2	80	23	12	24	21
2025 Q3	77	22	11	23	21
2025 Q4	75	24	11	21	19
2026 Q1	67	20	7	22	18

Excludes VAT. ¹. Includes freephone, special services, premium rate, directory enquiries and all other call types. Figures are not intended to include subscription revenues for internet access although some element may remain.

Table 5: Summary of call volumes by call type (millions of minutes)

	All Operators	BT	Virgin Media	Other	BT Share
UK geographic calls					
2024	11,209	4,975	1,253	4,981	44.4%
2025	8,480				
2025 Q1	2,349				
2025 Q2	2,122				
2025 Q3	2,009				
2025 Q4	2,000				
2026 Q1	1,833				
International calls					
2024	666	97	29	540	14.6%
2025	574				
2025 Q1	156				
2025 Q2	146				
2025 Q3	137				
2025 Q4	135				
2026 Q1	133				
Calls to mobiles					
2024	4,056	1,406	337	2,313	34.7%
2025	3,720				
2025 Q1	942				
2025 Q2	907				
2025 Q3	907				
2025 Q4	963				
2026 Q1	946				
Other calls¹					
2024	2,080	1,036	235	809	49.8%
2025	1,730				
2025 Q1	456				
2025 Q2	432				
2025 Q3	426				
2025 Q4	417				
2026 Q1	408				

¹Includes freephone, special services, premium rate, directory enquiries and all other call types.

Table 6: Summary of residential network access & call revenues (£millions)

	All Operators	BT	Virgin Media	Other	BT Share
Access & calls¹					
2024	3,813	1,973	731	1,109	51.7%
2025	3,187				
2025 Q1	853				
2025 Q2	815				
2025 Q3	779				
2025 Q4	740				
2026 Q1	705				
Access¹					
2024	3,618	1,898	710	1,010	52.5%
2025	3,016				
2025 Q1	809				
2025 Q2	773				
2025 Q3	737				
2025 Q4	698				
2026 Q1	666				
Calls					
2024	195	75	21	100	38.2%
2025	170				
2025 Q1	44				
2025 Q2	42				
2025 Q3	43				
2025 Q4	41				
2026 Q1	39				

Excludes VAT. ¹. Revenue figures are not intended to include subscription revenues for internet access although some element may remain.

Table 7: Summary of residential exchange line numbers at end of quarter (000's)

	All Operators	BT	Virgin Media	Other	BT Share
2024	19,074	5,364	3,435	10,275	28.1%
2025	16,878				
2025 Q1	18,500				
2025 Q2	18,026				
2025 Q3	17,401				
2025 Q4	16,878				
2026 Q1	16,264				

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

	All Operators	BT	Virgin Media	Other	BT Share
2024	11,388	5,358	1,564	4,466	47.1%
2025	8,523				
2025 Q1	2,407				
2025 Q2	2,135				
2025 Q3	2,009				
2025 Q4	1,971				
2026 Q1	1,810				

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls ¹
2024	195	75	23	42	56
2025	170	67	19	36	47
2025 Q1	44	18	5	9	12
2025 Q2	42	16	5	9	12
2025 Q3	43	17	5	9	12
2025 Q4	41	16	5	9	11
2026 Q1	39	15	4	8	11

Excludes VAT. ¹. Includes freephone, special services, premium rate, directory enquiries and all other call types. Figures are not intended to include subscription revenues for internet access although some element may remain.

Table 10: Summary of residential call volumes by call type (millions of minutes)

	All Operators	BT	Virgin Media	Other	BT Share
UK geographic calls					
2024	7,816	3,663	1,135	3,018	46.9%
2025	5,591				
2025 Q1	1,612				
2025 Q2	1,403				
2025 Q3	1,302				
2025 Q4	1,275				
2026 Q1	1,145				
International calls					
2024	332	73	29	230	22.0%
2025	260				
2025 Q1	73				
2025 Q2	69				
2025 Q3	61				
2025 Q4	57				
2026 Q1	56				
Calls to mobiles					
2024	1,572	706	199	667	44.9%
2025	1,339				
2025 Q1	358				
2025 Q2	331				
2025 Q3	322				
2025 Q4	328				
2026 Q1	301				
Other calls¹					
2024	1,667	916	201	550	54.9%
2025	1,333				
2025 Q1	364				
2025 Q2	332				
2025 Q3	325				
2025 Q4	312				
2026 Q1	308				

¹Includes freephone, special services, premium rate, directory enquiries and all other call types.

Table 11: Summary of business network access & call revenues (£millions)

	All Operators	BT	Virgin Media	Other	BT Share
Access & calls¹					
2024	998	442	16	540	44.3%
2025	876				
2025 Q1	233				
2025 Q2	227				
2025 Q3	214				
2025 Q4	202				
2026 Q1	187				
Access¹					
2024	824	395	13	416	47.9%
2025	730				
2025 Q1	192				
2025 Q2	190				
2025 Q3	181				
2025 Q4	168				
2026 Q1	159				
Calls					
2024	174	47	4	124	26.9%
2025	146				
2025 Q1	41				
2025 Q2	38				
2025 Q3	34				
2025 Q4	33				
2026 Q1	28				

Excludes VAT. ¹. Revenue figures are not intended to include subscription revenues for internet access although some element may remain.

Table 12: Summary of business exchange line numbers at end of quarter (000's)

	All Operators	BT	Virgin Media	Other	BT Share
2024	5,209	2,747	46	2,416	52.7%
2025	4,556				
2025 Q1	5,067				
2025 Q2	4,839				
2025 Q3	4,660				
2025 Q4	4,556				
2026 Q1	4,413				

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

	All Operators	BT	Virgin Media	Other	BT Share
2024	6,620	2,153	290	4,177	32.5%
2025	5,981				
2025 Q1	1,495				
2025 Q2	1,473				
2025 Q3	1,469				
2025 Q4	1,543				
2026 Q1	1,510				

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

	All calls	UK geographic calls	International calls	Calls to mobiles	Other calls ¹
2024	174	31	28	70	46
2025	146	27	28	56	36
2025 Q1	41	7	8	15	11
2025 Q2	38	7	7	15	9
2025 Q3	34	6	6	14	9
2025 Q4	33	8	6	12	7
2026 Q1	28	5	3	13	8

Excludes VAT. ¹. Includes freephone, special services, premium rate, directory enquiries and all other call types. Figures are not intended to include subscription revenues for internet access although some element may remain.

Table 15: Summary of business call volumes by call type (millions of minutes)

	All Operators	BT	Virgin Media	Other	BT Share
UK geographic calls					
2024	3,393	1,312	118	1,963	38.7%
2025	2,889				
2025 Q1	737				
2025 Q2	720				
2025 Q3	707				
2025 Q4	726				
2026 Q1	688				
International calls					
2024	334	24	0	310	7.2%
2025	314				
2025 Q1	82				
2025 Q2	77				
2025 Q3	77				
2025 Q4	78				
2026 Q1	77				
Calls to mobiles					
2024	2,484	700	138	1,646	28.2%
2025	2,381				
2025 Q1	585				
2025 Q2	576				
2025 Q3	585				
2025 Q4	635				
2026 Q1	645				
Other calls¹					
2024	409	117	34	258	28.6%
2025	397				
2025 Q1	91				
2025 Q2	100				
2025 Q3	101				
2025 Q4	105				
2026 Q1	100				

¹Includes freephone, special services, premium rate, directory enquiries and all other call types.

Table 16: Summary of residential and small business broadband connections at end of quarter (000's)

	Total	ADSL	Cable	Other (inc. FTTx)	BT retail Share
2024	29,217	1,809	5,269	22,138	30.3%
2025	29,342				
2025 Q1	29,165				
2025 Q2	29,175				
2025 Q3	29,242				
2025 Q4	29,342				
2026 Q1	29,448				

Note: Other (inc FTTx) figures have been restated to reflect more accurate data, however, they are likely to be understated as Ofcom does not collect data from all UK altnet full-fibre providers. We are currently engaging with industry to improve the coverage of this data.

3. Mobile Telecoms market data tables

Q1 2026 (January to March)

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Note: The data in these tables is the most accurate currently available. Where historical restatements have occurred, this is due to either operator restatements or improvements in methodology.

Table 1: Estimated retail revenues generated by mobile telephony (£millions)

	Total	Access and bundle d svcs	UK fixed calls	On-net mobile calls	Off-net mobile calls	Int'l calls	Other calls	SMS and MMS	Data service s
2024	14,144	11,847	31	54	56	104	180	435	1,438
2025	14,504	12,356	25	46	48	92	158	406	1,372
2025 Q1	3,515	3,001	7	12	12	24	41	93	326
2025 Q2	3,686	3,140	6	12	13	23	40	102	349
2025 Q3	3,687	3,125	6	12	12	23	44	98	367
2025 Q4	3,617	3,090	5	11	11	22	33	112	331
2026 Q1	3,570	3,086	5	10	11	22	31	89	315

Note: From 2018, bundled revenues are reported according to the new IFRS15 accounting standard, and they do not include any device revenues.

Table 2: Call, message, and data volumes by call type (billions of minutes/billions of messages/PB)

	All calls	UK fixed calls	On-net mobile calls	Off-net mobile calls	Int'l calls	Calls when roamin g	Other calls	SMS & MMS messag es	Data
2024	157.86	27.37	47.89	75.68	1.41	1.33	4.19	28.03	10,452
2025	149.18	25.08	45.22	72.45	1.14	1.23	4.06	21.51	11,743
2025 Q1	38.10	6.54	11.54	18.41	0.31	0.28	1.03	5.86	2,691
2025 Q2	37.09	6.21	11.24	18.01	0.30	0.34	1.01	5.44	2,911
2025 Q3	36.86	6.29	11.07	17.82	0.27	0.36	1.04	5.24	3,055
2025 Q4	37.11	6.04	11.37	18.21	0.26	0.25	0.98	4.96	3,087
2026 Q1	36.34	6.07	11.06	17.86	0.25	0.24	0.87	4.61	3,042

Note: Includes estimates where Ofcom does not receive data from providers

Table 3: Subscriber numbers by type (millions)

	Total subs at end of period	Post-pay subs at end of period	Pre-pay subs at end of period	Net change during period	Proportion post-pay	Mobile broadband subs at end of period
2024	90.00	67.30	22.70	0.85	74.77%	4.86
2025	91.06	68.96	22.10	1.06	75.73%	5.12
2025 Q1	89.70	67.71	21.98	-0.30	75.49%	4.79
2025 Q2	89.98	67.92	22.07	0.29	75.47%	4.93
2025 Q3	91.04	68.47	22.57	1.05	75.21%	5.03
2025 Q4	91.06	68.96	22.10	0.02	75.73%	5.12
2026 Q1	90.58	69.03	21.55	-0.48	76.21%	5.21

Note: Includes estimates where Ofcom does not receive data from providers; excludes M2M connections.

Table 4: Average monthly retail revenue per subscriber (£ per month)

	All subscribers	Post-pay contract	Pre-pay
2024	13.16	15.85	5.36
2025	13.38	15.98	5.45
2025 Q1	13.04	15.57	5.40
2025 Q2	13.68	16.36	5.43
2025 Q3	13.58	16.20	5.57
2025 Q4	13.24	15.79	5.40
2026 Q1	13.10	15.54	5.40

Table 5: Interconnection call volumes (billions of minutes)

	All operators
2024	61.17
2025	57.72
2025 Q1	14.93
2025 Q2	14.56
2025 Q3	14.03
2025 Q4	14.20
2026 Q1	13.55

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