

Connected Nations

Scotland Report 2025

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Overview

Consumers and businesses rely on good connectivity – whether at home, at work or on the move. We want to ensure that UK consumers have access to high quality networks, to enable a wide range of digital services which drive economic growth. The Connected Nations report, prepared and published under the Communications Act 2003, helps us monitor the availability of these networks and provides data to help stakeholders understand the networks which are available in their area. ¹

This year's Connected Nations report for Scotland provides an update on the continued rollout of fixed and gigabit-capable networks and 5G mobile networks, including for the first time reporting on 5G standalone coverage. It also includes an update on the take-up of full fibre and gigabit-capable broadband services and low Earth orbit (LEO) satellite broadband services.

Alongside this Scotland report, we are also publishing reports on <u>broadband and mobile availability</u> <u>for the UK as a whole</u> and each of its other nations. More granular data is available through our <u>interactive dashboards</u>, allowing readers to explore coverage in their area and compare trends over time. In addition, the coverage and take-up data are available for download as open data files.

Highlights

Broadband

Over seven in ten (71%) residential premises in Scotland now have full-fibre coverage. This is an increase of nine percentage points from last year and represents an additional 250,000 premises having access to full fibre compared to July 2024.

The rate of expansion in coverage for full-fibre and gigabit-capable networks is in line with the rest of the UK. However, Scotland still has the lowest level of full-fibre coverage of the four UK nations.

Take-up of full-fibre broadband by consumers in Scotland continues to increase. Take-up rates rose from 35% of Scottish premises where those services are available in July 2024 to 43% in July 2025, an eight-percentage point increase following last year's seven-percentage point rise. This has brought Scotland in line with the UK average of 42% but remains behind Wales (49%) and Northern Ireland (62%).

More Scottish households are using satellite connectivity, particularly in harder to reach areas. The number of Starlink subscribers in Scotland has risen to over 15,000 in 2025 from 11,000 last year.

The reduction in the number of Scottish premises unable to access decent broadband has accelerated. Only 10,000 (0.4%) premises in Scotland cannot access decent broadband from fixed landlines or Fixed Wireless Access (FWA), a decrease of 5,000 premises over the last year. This compares to a decrease of 2,000 premises between September 2023 and July 2024.

Mobile

5G standalone (SA) has a notable amount of coverage and deployments. In Scotland, 5G SA coverage outside premises from at least one MNO is at 77% at our High Confidence level.^{2,3}

¹ Sections 134A to 134B.

² By 'coverage outside premises', we mean coverage that is predicted in a 100x100m area in which a dwelling is located, which can be considered as a proxy for outdoor coverage of populated areas in the UK.

³ By 'At least one MNO', we mean the combined coverage that would be available if the total coverage of each MNO was included in an aggregated coverage footprint.

Overall 5G coverage has seen modest but continued growth. The range of 5G coverage outside premises at High Confidence across the four MNOs has improved from 54%-76% last year to 59%-84% this year.

4G coverage has been sustained across Scotland. 4G geographic coverage from each MNO has risen by one to two percentage points from last year.

Fixed broadband and voice

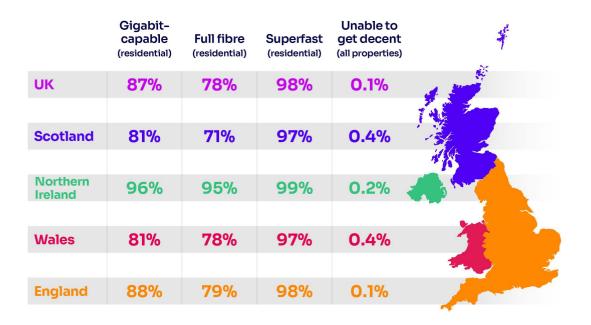
Introduction

This section presents our latest findings on the rollout of full fibre and other fixed-line networks in Scotland, and reports on the take-up of services over these networks. We also provide an update on the deployment of FWA networks and take-up of satellite broadband services. While most premises now have access to a high-speed network, we provide the latest data on the small number of properties that do not yet have access to a decent broadband service. Additionally, we provide data on average speeds for broadband services in Scotland.

Our <u>Connected Nations: UK Report 2025</u> covers broader trends in the fixed telecoms sector, including the continuing migration of residential customers from the traditional voice network to digital voice services, as well as international comparisons on fixed broadband coverage and take-up.

Summary of broadband coverage at a fixed location across the UK and nations

Figure 2.1: Summary of broadband coverage at a fixed location across the UK and nations



Source: Ofcom analysis of provider data (July 2025)

Full-fibre and gigabit-capable coverage

There has been sustained improvement in coverage of full-fibre broadband networks across Scotland over the last year, matching the rate of growth across the UK as a whole.

Figure 2.2 outlines that over seven in ten (71%) of residential premises in Scotland now have access to full-fibre connections, while over eight in ten (81%) have access to gigabit-capable networks. This represents an additional 250,000 Scottish residential premises with potential full-fibre connectivity in the last year. Nonetheless, of the four UK nations, Scotland still has the lowest proportion of full-fibre coverage.

Gigabit-capable and full-fibre broadband coverage across the UK

SCOTLAND
Full fibre 71%
Gigabit-capable 81%

ENGLAND
Full fibre 79%
Gigabit-capable 88%

SCOTLAND
Full fibre 78%
Gigabit-capable 81%

SCOTLAND
Full fibre 78%
Gigabit-capable 81%

SCOTLAND
Full fibre 78%
Gigabit-capable 95%
Gigabit-capable 96%

Figure 2.2: Gigabit-capable and full-fibre broadband coverage by UK nation

Source: Ofcom analysis of provider data (July 2025)

While Table 2.1 outlines that full-fibre and gigabit-capable coverage is higher in urban areas, growth in full-fibre coverage is consistent across both urban and rural areas, increasing by nine and eight percentage points respectively from July 2024. Gigabit-capable networks have also continued to grow, with an increase in rural areas at eight percentage points higher than last year, surpassing urban growth which is at four percentage points.

Table 2.1: Residential full-fibre and gigabit-capable network coverage in Scotland by rurality

	Full fibre	Gigabit capable
Urban	76%	89%
Rural	50%	51%
Total	71%	81%

Source: Ofcom analysis of provider data (July 2025)

While much of the coverage delivered has been through commercial rollout, improvements in rural coverage in Scotland have also been supported through public funds or intervention.

The Scottish Government's Reaching 100% (R100) programme aims to ensure every home and business has access to superfast broadband, defined as a minimum of 30 Mbit/s download speed. As of October 2025, the programme has delivered a total of almost 113,000 connections, with over 5,800 of these being through the Scottish Broadband Voucher Scheme (SBVS).⁴

The UK Government's <u>Project Gigabit</u> programme is also moving forward in Scotland, aimed at delivering gigabit-capable coverage to areas of the UK not included in commercial build plans. The Scottish Government is working closely with the UK Government to deliver Project Gigabit procurements in Scotland, with three already awarded and more expected to follow in the coming months.⁵

Levels of full-fibre coverage across Scotland's 32 local authority areas continue to vary widely. The top three Scottish local authorities with the highest percentage of premises with full-fibre coverage, as shown in Table 2.2, remain the same as last year. All three local authorities had around a two-percentage point increase in coverage from last year. The bottom three local authorities have changed slightly, with Argyll and Bute falling to thirtieth position. However, it has still seen a seven-percentage point increase (from 15% to 22%) in coverage compared to July 2024. Detailed coverage data for each Scottish local authority – as well as Westminster and Scottish Parliament constituencies – is available in our interactive report.

Table 2.2: Highest and lowest levels of residential full fibre broadband coverage by selected Scottish local authority area

Rank	Scottish Local Authority	% of premises with full fibre coverage
1	Aberdeen City	92%
2	Midlothian	92%
3	Glasgow City	91%
30	Argyll and Bute	22%
31	Shetland Islands	18%
32	Na H-Eileanan Siar	10%

Source: Ofcom analysis of provider data (July 2025)

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⁴ Scottish Government, <u>R100 – Data Insights</u>, 14 October 2025

⁵ Scottish Government, <u>About Project Gigabit</u>

Superfast coverage

Superfast broadband describes any service that can provide a download speed of at least 30 Mbit/s. Superfast coverage remains very high in Scotland, as shown in Table 2.3, with an overall increase of one percentage point from last year. However, in terms of rural coverage, Scotland is still behind the rest of the UK, despite a four-percentage point increase from July 2024.

Table 2.3: Superfast coverage by nation (as a percentage of residential premises)

Nation	Total	Urban	Rural
Scotland	97%	99%	87%
England	98%	99%	92%
Northern Ireland	99%	99%+	96%
Wales	97%	99%	89%
UK	98%	99%	91%

Source: Ofcom analysis of provider data (July 2025)

Take-up of services on full-fibre networks

Take-up of full-fibre broadband services in Scotland continues to grow, rising from 35% of all premises where those services are available in July 2024 to 43% in July 2025, an eight-percentage point increase following last year's seven-percentage point rise. Table 2.4 compares this take-up rate with the other UK nations. Take-up is also consistently higher in rural over urban areas in all UK nations, with 60% take-up from rural premises in Scotland against 40% of urban premises.

Table 2.4: Take-up of broadband services on full-fibre networks (as a percentage of all premises where those services are available)

Nation	Full fibre
Scotland	43%
England	41%
Northern Ireland	62%
Wales	49%
UK	42%

Source: Ofcom analysis of provider data (July 2025)

Data usage over fixed networks

Average monthly data usage (the total amount of data downloaded and uploaded over the broadband connection) per fixed connection in Scotland is 530 GB. This is an increase from the 2024 average and is in line with UK-wide trends with both showing an increase of around 50 GB.

The average data usage on full-fibre connections is slightly higher at 624 GB. Scotland's average data usage remains lower than average data usage for the UK overall.

Wireless and Satellite networks

FWA and satellite networks provide consumers with an alternative where they do not have access to a fixed access network or even where fixed networks are available.

FWA services from mobile network operators (MNOs) are provided over licensed 4G and 5G networks. Three of the UK's four MNOs currently offer FWA services in the UK. We estimate that, in line with July 2024, 95% of premises in Scotland have access to a fixed wireless service from a mobile operator, which is at a similar level to the UK as a whole.

Fixed wireless services can also be delivered over networks that communicate via a wireless link between a provider's mast site and an external antenna fixed to a customer's premises, by providers known as WISPs. Based on estimates from providers, around 1% of residential premises in Scotland have coverage from a WISP.⁶

Further background on FWA and satellite technologies is provided in the <u>Connected Nations: UK Report 2025</u>.

Table 2.5: Coverage of MNO and WISP FWA networks with at least decent broadband (residential)

Nation	MNO FWA	WISP FWA
Scotland	95% (2.8m)	1% (0.02m)
England	96% (25.9m)	8% (2.2m)
Northern Ireland	85% (0.8m)	3% (0.03m)
Wales	94% (1.5m)	24% (0.37m)
ИК	96% (30.9m)	8% (2.65m)

Source: Ofcom analysis of provider data (July 2025)

Satellite services

Satellite technologies continue to evolve, and low Earth orbit (LEO) satellite constellations in particular could potentially help to serve rural areas of Scotland which are harder to reach through other technologies. At present Starlink is the only LEO operator currently offering broadband coverage across the UK including in harder-to-reach areas. Take-up of Starlink in Scotland continues to rise, with over 15,000 subscribers in 2025 compared to 11,000 in 2024. Approximately 2,000 (of these subscribers are without access to decent broadband through other means. We note that Amazon also has plans to offer direct to consumer broadband from 2026.⁷

⁶ The number of providers reporting to us this year has reduced to 16 (compared to 20 in 2024), as we have stopped collecting data from a number of smaller providers and two networks have merged.

⁷ Amazon, <u>Everything you need to know about Amazon Leo, Amazon's satellite broadband network</u>, 14 November 2025.

Access to decent broadband

Decent broadband is defined as a connection which provides at least 10 Mbit/s download speed and 1 Mbit/s upload speed. Since last year, the number of premises not able to access decent broadband services through a fixed line in Scotland has decreased by 10,000 to around 55,000, or 2% of all premises. This is falling at a faster rate than previously, with 2023 to 2024 seeing a reduction of 8,000 premises.

Beyond fixed line access, some premises will be able to access decent broadband via FWA through MNOs or WISPs. When considering both fixed line and FWA coverage, we estimate that this leaves around 0.4% or 10,000 premises in Scotland without access to a decent broadband service. This is a decrease of 5,000 premises since last year, compared to a decrease of 2,000 premises between 2023 and 2024.

Figure 2.3: Number of premises without a decent broadband connection in Scotland



Source: Ofcom analysis of provider data (July 2025)

Broadband universal service obligation

The broadband universal service obligation (USO) provides the right to request a broadband connection with a download speed of at least 10 Mbit/s and an upload speed of 1 Mbit/s (as well as several other specific technical characteristics) to a home or business, subject to eligibility and affordability requirements. BT is the universal service provider for the UK (excluding Hull), and KCOM for the Hull area. They are required to provide the USO and to report at six monthly intervals on delivery. On the Hull area is a service provide the USO and to report at six monthly intervals on delivery.

⁸ These speeds reflect the broadband universal service obligation set by the UK Government, as outlined further below.

⁹ In particular, these characteristics are: (i) a contention ratio of no more than 50:1; (ii) latency which is capable of allowing the end user to make and receive voice calls effectively; and (iii) the capability to allow data usage of at least 100 GB a month.

¹⁰ BT, <u>USO Reports</u>. KCOM, <u>USO Reports</u>. To date, we understand that KCOM has not received any eligible USO orders.

As of September 2025, BT had received 123 USO orders in Scotland since the launch of the USO in March 2020. Each order requires network build that can serve multiple premises, and therefore these orders have led to full-fibre connections being built that can serve 582 Scottish premises.

Mobile, data and voice

Introduction

Mobile connectivity plays a vital role in how people across Scotland access services, communicate and stay connected. This section provides an update on the availability of mobile services, based on data submitted by mobile network operators (MNOs) and neutral host providers. We report on the rollout of 5G services, including for the first time an overview of standalone 5G coverage. We continue to track the availability of 4G coverage, both outdoors and indoors, across Scotland's landmass and road network. Finally, we also provide an update on mobile traffic growth.

Our reporting on mobile coverage in this report uses the same methodology as in previous Connected Nations reports. However, we continue to consider how to evolve our approach to mobile coverage reporting and we will explore this further with MNOs over the coming year. This year, we include selected statistics from our new, consumer-facing web-based coverage checker tool, Map Your Mobile, which provides local coverage information.

We recommend that this section is read in conjunction with the 'Mobile, data and voice' section in our <u>Connected Nations</u>: <u>UK Report 2025</u>, which includes additional information on areas such as mobile investment and the 2G and 3G switch off.

Summary of mobile coverage

5G 5G SA 4G Voice outside outside outside 4G 4G and text total premises premises geographic total (MNO range) (MNO range) (MNO range) not spots not spots UK 64-89% 47-65% 99-99%+ 89-90% 4% 3% Scotland 59-84% 40-64% 99-99%+ 79-81% 10% 6% Northern 38-95% 90-96% 2% 1% 20-91% 98-99% Ireland **Wales** 23-89% 12-57% 99% 84-90% 2% 3% **England** 67-91% 47-67% 99%+ 95-96% 1% 1%

Figure 3.1: Overview of voice and data coverage across the UK^{11,12}

Source: Ofcom analysis of MNO data (July 2025)

5G coverage

The transition to 5G standalone (SA) coverage is now well underway in Scotland, although still sitting behind the rest of the UK, while overall 5G coverage continues to improve. 5G SA uses a new 5G core network, which could better enable new use cases such as Augmented Reality/ Virtual Reality and robotics. This differs to 5G non-standalone, which involves deploying 5G radio equipment alongside existing 4G with services delivered over the 4G core network. Further information on how we define and measure 5G coverage can be found in our Connected Nations: UK Report 2025.

5G standalone

We are seeing a notable amount of reported 5G standalone coverage and deployments, with 5G SA accounting for approximately 41% of all 5G sites in the UK.¹³

¹¹ The MNO ranges in this figure refer to the span between the MNO with the least coverage and that with the most coverage on a given measure. For 5G and 5G SA outside premises the MNO range is based on our 'High Confidence' measure, rather than the 'Very High Confidence' measure which we also use in this report. Note that only three MNOs have deployed 5G SA services. References to 5G SA in this report therefore reflect the coverage and traffic reported by these operators only. Three does not currently deploy 5G SA services.

¹² Further information on how we define and measure coverage can be found in our Connected Nations Methodology

¹³We note that 5G SA and 5G NSA site counts are not mutually exclusive; some physical sites may support both 5G SA and 5G NSA.

In Scotland, 5G SA coverage outside premises from at least one MNO stands at 77% at the High Confidence level and 66% at the Very High Confidence level. This compares to 83% at the High Confidence level, and 74% at the Very High Confidence level across the UK.

Outdoor premises coverage of 5G

Coverage of overall 5G in areas outside of premises from at least one MNO increased by two percentage points compared to 2024 at the High Confidence level, reaching 93%, and by four percentage points at the Very High Confidence level, reaching 89%.

Figure 3.2: MNO range for 5G coverage outside premises at the high confidence level.



Source: Ofcom analysis of MNO data (July 2025)

Figure 3.2 shows that, across the four MNOs, outside premises 5G coverage ranges from 59% to 84% at the High Confidence level (up from 54% to 76% in September 2024). At the Very High Confidence level this ranges from 36% to 80% (up from 35% to 71%). BT/EE remains the MNO with the highest level of coverage at both High and Very High Confidence levels.

5G geographic coverage

5G geographic coverage in Scotland continues to progress at a modest pace. 37% of Scotland's landmass has coverage from at least one MNO at the High Confidence level (up from 33% in 2024). The range between MNOs of 5G geographic coverage at the High Confidence level is 7-21% (up from 6-19% in 2024) and 3-18% at the Very High Confidence level (up from 3-16% in 2024). These are the lowest 5G geographic coverage ranges of all four UK nations.

5G deployments

These modest increases in coverage have been driven by additional 5G deployments, with over 29,100 5G sites now operational across the UK, representing an increase of 26% on 2024.¹⁴

¹⁴ These deployments do not necessarily equate to the total number of unique physical sites across UK. This is because multiple MNOs may be offering coverage from the same site. As such, the reported site count reflects the aggregate number of deployments across all MNOs, rather than distinct physical site infrastructure. Also, this encompasses the various 5G mobile deployment types i.e. 5G NSA, 5G SA and Dynamic Spectrum Sharing (DSS).

Distribution of these sites across the UK nations has remained consistent – with 9% located in Scotland – and is broadly aligned with national distribution of mobile traffic.

4G coverage

4G geographic coverage

While 5G coverage is expanding, it is important to note that most people still use voice and data services over 4G. 4G geographic coverage levels in Scotland have been broadly stable between 2024 and 2025, as demonstrated in Table 3.1.

Table 3.1: 4G geographic coverage in Scotland by MNO

	2024	2025
BT/EE	79%	80%
Three	77%	79%
VMO2	79%	79%
Vodafone	80%	81%

Source: Ofcom analysis of MNO data (September 2024, July 2025)

Last year's <u>Connected Nations 2024: Scotland</u> report outlined that the Shared Rural Network had likely contributed to the rise in 4G geographic coverage. The MNOs met their 2024 obligations to deliver good geographic coverage to 88% of the UK landmass and have continued to maintain coverage at around this level over the past year. Further obligations are in place for MNOs to rollout additional sites in "Total Not Spot" areas by 2027. ¹⁵ Additional information on the Shared Rural Network, and other factors impacting 4G Geographic coverage, can be found in the <u>Connected Nations: UK Report 2025</u>.

Scotland remains the UK nation with the lowest levels of 4G geographic coverage, as outlined in Table 3.2, with all four UK nations seeing broadly stable coverage in the last year.

Table 3.2: 4G geographic coverage as a percentage of landmass served by all operators by UK nation

Nation	2024	2025
Scotland	65%	67%
England	90%	90%
Northern Ireland	85%	85%
Wales	75%	77%
ик	80%	81%

¹⁵ "Total Not Spot" means geographical areas within the UK falling outside all the MNOs' 2020 Baseline Coverage Footprints.

Outdoor premises 4G coverage

MNOs continue to provide a high level of 4G coverage outside of premises in Scotland, with 99% of premises having outdoor 4G coverage from all four operators, in line with the rest of the UK. Table 3.3 demonstrates that there are now high levels of coverage outside premises across all MNOs in rural areas of Scotland.

Table 3.3: Outdoor premises 4G coverage in rural Scotland (by operator)

MNO	Percentage of rural premises with outdoor 4G coverage
BT/EE	98%
Three	97%
VM02	97%
Vodafone	98%

Source: Ofcom analysis of MNO data (July 2025)

Indoor premises 4G coverage

Indoor mobile coverage can vary depending on factors such as wall thickness, building materials used in construction and where in a building people are using their phone. Consequently, there may be differences between MNOs' predicted indoor coverage data and the actual experience in some premises. There have been slight improvements in the percentage of indoor premises with 4G coverage from all four MNOs from last year in all nations, except Scotland. Nevertheless, Scotland is on a par with England in being the UK nation with the highest percentage of 4G coverage from all four MNOs for indoor premises.

Table 3.4: Indoor premises 4G coverage by UK nation

Nation	At least one MNO	All four MNOs
Scotland	99%+	89%
England	99%+	89%
Northern Ireland	99%	75%
Wales	99%	82%
UK	99%+	88%

Source: Ofcom analysis of MNO data (July 2025)

¹⁶ For Connected Nations reporting, indoor coverage is determined by applying an average building entry loss of 10dB across buildings. This approach provides only a simplified view of indoor coverage and the real experience depends heavily on the types of building material and insulation in a specific building.

Map Your Mobile coverage checker

As mentioned earlier in this section, we have made changes to our web-based coverage checker with the introduction of Map Your Mobile (MYM). These changes included using higher signal strength thresholds, incorporating crowdsourced performance data and providing clearer explanations of the tool's purpose. The MYM aim is to give consumers better insight into the availability of services at a local level, helping them make informed choices about providers.

In determining coverage MYM applies outdoor thresholds of -95dBm and -105dBm, offering a technology-neutral approach to local predictions and using coverage data at a finer granularity of 50m x 50m pixels. ^{17,18} These thresholds were not intended to replace those used in Connected Nations, but rather to address known uncertainties in local-level predictions and reflect the requirements of the more demanding services used today. ¹⁹

Table 3.5 gives an overview of Scotland's coverage using the MYM thresholds, showing Scotland as having the lowest percentage of geographic coverage in all the four nations. More detailed data is available through our <u>interactive report</u>.

Table 3.5: Geographic coverage using MYM thresholds

Nation	From at least one MNO		From all four MNOs	
	-105dBm	-95dBm	-105dBm	-95dBm
Scotland	90%	78%	67%	39%
England	99%	94%	91%	59%
Northern Ireland	98%	92%	86%	51%
Wales	97%	87%	77%	47%
ик	96%	88%	82%	51%

Source: Ofcom analysis of MNO data (July 2025)

Voice coverage

Mobile voice services from all four MNOs are available across 70% of Scotland's geography, which is a slight increase of one percentage point from last year. Voice coverage outside and inside premises from all MNOs remain at 99% and 93%, respectively. There also remains a disparity between urban and rural inside premises coverage from all MNOs, with urban areas at 97% compared to rural which is at 75%. However, 99% of rural premises do have voice coverage from at least one MNO. Further information can be found on our interactive dashboard.

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 $^{^{17}}$ The technology-neutral approach currently reports coverage using the combined footprint of 4G and 5G networks, simplifying the presentation of information and focusing on user experience rather than technology.

¹⁸ Map Your Mobile coverage checker methodology - August 2025

¹⁹ MYM uses a performance level defined as: ≥5 Mbit/s download, ≥1.5 Mbit/s upload, and ≤50 ms latency. There is no signal strength within a reasonable range above which performance is guaranteed or below which performance is zero. This highlights the need for exercising judgement in setting thresholds for our coverage reporting, including judgement about how consumers will interpret what is being portrayed.

²⁰ Mobile voice services through 2G, 3G and 4G.

Roads coverage

Scotland's road network covers 37,100 miles (15% of the UK total), ranging from major trunk routes to single carriageways in remote areas. Good 4G and voice coverage is important along this road network to assist with vehicle communications, navigation, infotainment and safety aids. A detailed breakdown of coverage along motorways, A and B roads can be found via our interactive dashboard.

Table 3.6: In-vehicle 4G and voice coverage on major roads (motorways and A roads) in Scotland, by operator²³

MNO	4G	Voice
BT/EE	87%	87%
Three	85%	89%
VM02	86%	97%
Vodafone	89%	90%
All operators	68%	75%
At least one operator	98%	99%

Source: Ofcom analysis of MNO data (July 2025)

Mobile traffic

Monthly mobile traffic continues to grow in Scotland, building on previous trends, with a significant increase of 16 PB (18%) to 104 PB between July 2024 and July 2025.^{24, 25}

There has also been a notable increase in the absolute level of 5G traffic (rising from 14 PB to 23 PB) and its share of the overall total in Scotland (rising from 16% to 22%) between July 2024 and July 2025. Nonetheless, 4G remains the predominant carrier of mobile traffic, with 80 PB (77% of total traffic) in July 2025.

Further information about these trends can be found in our Connected Nations: UK Report 2025.

²¹ UK Government, National Statistics: Road Lengths in Great Britain: 2024, 20 February 2025.

²² Good quality coverage is defined as the ability to sustain a 90 second voice call and access data speeds of at least 2 Mbit/s, with a methodology to assess this based on a 4G signal of at least -105 dBm — consistent with the Connected Nations methodology for reporting 4G coverage.

²³ Since September 2023, road coverage at the "All Operators" level was overestimated due to an error in the calculation. This issue has now been corrected for all periods from September 2023. Compared with previous interactive reports, the coverage reported in this update may show a noticeable decrease.

²⁴ These figures refer to monthly mobile traffic based on data collected from MNOs in the month of July 2024 and 2025. 1 PB (petabyte) is equivalent to 1,000,000 GB (gigabyte).

²⁵ The reported total monthly traffic includes all traffic across mobile networks, and therefore includes traffic generated by Fixed Wireless Access, where operators are offering domestic fixed broadband services over their wireless networks. Three MNOs offer FWA services with varying traffic splits, ranging from approximately 2% to 40%.