Pricing and consumer engagement

Trends in the UK communications sector

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Foreword

Ofcom's role is to ensure fair competition and support affordable prices and high-quality services for phone and broadband, while encouraging long-term investment in the networks that the country needs for future growth, productivity and innovation. This report shines a light on the prices at which the communications services we all rely on are offered, what users pay for them, and how people engage with the market.

In a period when many UK households continue to struggle with cost-of-living pressures, competition in UK communications markets is working well for customers, giving them a wide range of choice, while the prices of most telecoms services have remained flat or fallen in recent years, in real terms.

The market is delivering investment in networks that give customers access to better quality services and offer greater reliability and security. Seventy-eight per cent of UK residential premises now have access to full fibre broadband, an increase of nine percentage points year on year and up from 6% in 2018. 5G coverage continues to increase, and UK consumers can now benefit from extensive 5G standalone availability which, among other benefits, provides faster speeds and more reliable connectivity in busy areas. However, there is more to be done as the experience of using services is not always good enough, particularly in mobile.

Consumer engagement and switching between providers are essential for markets to function effectively and for consumers to benefit from competition. A key priority for Ofcom is to help people engage with the market and choose the services that best meet their needs. We have done this in several ways.

Our rules mean that providers must notify customers when their current contract is coming to an end (and in each subsequent year they remain out of contract) and advise them of some of the alternatives available to them and what they will pay if they take no action.

The Ofcom website includes a broadband coverage checker which gives consumers information about the fixed broadband services that are available to them, and our updated mobile coverage checker, Map Your Mobile, provides not only information on mobile coverage but also how well networks perform in coverage areas, as poor network quality can make using services a challenge. From its launch in late June 2025 to the end of the year, 630,000 people used Map Your Mobile.

We have rules to ensure that when customers are comparing deals, providers clearly set out certain information about their services. In January 2025, we introduced new rules requiring providers to clearly set out any price rises included in contracts in pounds and pence before a customer signs up. These rules were introduced to improve the transparency of the information consumers receive about the price they can expect to pay over the life of the contract.

As the rules are recent, we do not currently have sufficient evidence to draw any firm conclusions on how they have impacted consumer behaviour and the market in general (in terms of consumer understanding, switching behaviour and pricing). However, our initial assessment based on the information currently available is that the rules are providing greater clarity to customers at the point of sale, making it easier of them to compare deals.

We will be able to undertake a full analysis of the impact of the new rules in 2027, when the main providers' customers have been moved onto the new contracts and more evidence is available.

As in previous years, the report highlights that customers who engage with the market and sign up to new deals with their current provider, or a new provider, typically pay lower prices than those who are out of contract. Switching has never been easier: we have transformed switching processes to make it simpler for customers to switch, to avoid interruptions in service, and to stop double charging, preventing consumers paying for both their old and new services for a short period.

In September 2024 the One Touch Switch process for fixed broadband services was launched, with over 2 million residential switches completed since then. The Auto-Switch mobile switching service enables customers to change provider simply and quickly by sending a free text to their mobile company. They can do this whether they want to keep their current number or get a new one.

In the round, our data suggests that most customers are classed as being either 'active' or 'browsers', meaning they are engaging with the market and benefiting from these regulations and services, which helps drive switching and re-contracting, and saves people money.

Many households continue to face affordability challenges; access to social tariffs for those on means-tested benefits and support for vulnerable customers are vital to ensure that people have access to the services that best meet their needs. Providers have responded to our calls to offer social tariffs – the number available to customers has increased from three in 2020 to more than 30 in December 2025. However, awareness and take-up are now the challenge: 70% of eligible households were unaware of social tariffs in October 2025, and take-up is low as a proportion of eligible households (less than 9%).

We welcome the Government's Telecoms Consumer Charter, and the voluntary commitments which the UK's largest fixed and mobile communications providers have signed up to, and which build on existing Ofcom's protections. These commitments include: (i) making sure that social tariffs are well-signposted and easier to access; (ii) that April 2026 will be that last time they apply inflation-linked in-contract price rises; and (iii) that where a customer's contract contains a mid-contract price increase, the price they sign up to is the price they will pay.

Overview

This report looks at trends in the prices of UK residential fixed broadband, fixed voice, mobile phone, and pay TV services, including Subscription Video on Demand (SVoD) services. It covers the tariffs at which bundled and standalone services are offered and how much customers pay for these services, and looks at levels of consumer engagement, switching, affordability and customer debt.

Most of the analysis is based on tariff data, i.e. the prices offered to new customers on providers' websites, although we do include some analysis of customer spend data that has been collected from telecoms operators. We also use operator data and consumer research to look at affordability and customer engagement.

Much of the data in this report has been adjusted for inflation using Office for National Statistics Consumer Prices Index (CPI) figures. By using adjusted prices, the figures are presented in a way that eliminates the impact of inflation. However, in times of high inflation (as the UK has experienced in recent years) this adjustment can mask price increases that are large in terms of pounds and pence.

For this reason, we have included both inflation-adjusted ('real-terms') and unadjusted ('nominal') prices in some of the charts. The interactive dashboard, published alongside this report, includes the ability to look at trends based on both real-terms and nominal prices.

Data sources used in this report

Operator data: data collected by Ofcom from the UK's leading residential fixed and mobile telecoms providers, including customer-level mobile spend data.

Pure Pricing tariff information: monthly retail tariff data for broadband (including line rental and bundled services) and mobile plans.

OECD's basket-based residential 'multi-play' UK price benchmarking model: identifies the lowest-cost tariffs from providers in the model to fulfil a given household/user profile, and calculates an average price weighted by providers' market shares.

OECD's basket-based international communications price benchmarking model: compares the best prices available from the leading providers in each country, by retail market share, to buy a 'basket' of services.

Ofcom consumer research: including Ofcom's Communications Affordability Tracker and Switching Tracker (which includes the Engagement Index).

What we have found – in brief

Prices for faster broadband and data-rich mobile services are declining

- **Lower prices are encouraging the take-up of faster broadband services.** Prices for dual-play (fixed broadband and fixed voice) bundles with superfast (advertised speed 30-299 Mbit/s) and ultrafast (≥300 Mbit/s) broadband products fell at a faster rate than those with standard broadband (<30 Mbit/s) in the year to September 2025. Separately, analysis of average standalone broadband prices for five different speed tiers finds that prices fell in real terms for all but the slowest (<30 Mbit/s) speed tier year on year. In many cases, customers can switch to a faster, more reliable full-fibre broadband service and pay the same, or less, than they currently do for a copper or part-fibre service.

- **Mobile phone airtime prices continue to fall as customers get more data for less.** The price of a basket of mobile services based on average usage and prices in 2025 was 6% lower in real terms than the price of the equivalent basket using 2024 usage and prices. From 2020 to 2025, the cost of this average-use basket fell by 20%, despite average data use more than doubling. The prices of tariffs with over 10 GB of inclusive data per month fell between 2024 and 2025, while prices of tariffs with less data included increased. Analysis of customer spend data shows that most people are paying less for their mobile services and/or getting more value through larger data allowances and/or additional benefits.

- **Overall, the UK ranked third for communications prices in 2025, compared to France, Germany, Italy, Spain and the US.** Among these countries, the UK had the lowest triple-play (fixed broadband, fixed voice and TV) bundle prices (out of the four countries offering these services), the second-lowest standalone mobile prices, the third-lowest overall standalone broadband and fixed voice prices, and was ranked fourth overall for dual-play bundles.

New Ofcom rules are giving customers clarity and certainty about what they will pay for a service

- **From January 2025, providers have been required to set out any mid-contract price rises clearly in pounds and pence before a customer signs up.** Our initial assessment suggests that the rules are providing greater clarity on what customers will pay at the point of sale, making it easier for them to compare the prices of services.

- **In-contract price rises announced for 2026 range from between £1.80 and £2.50 for mobile services and £2 and £4 for fixed broadband**. There is not yet sufficient evidence to draw firm conclusions about the impact of the tariffs introduced by providers to comply with the new rules on overall bills or customer engagement. This is because, in March/April 2025 - when the first such increases were applied - only a limited proportion of customers were on contracts with the new fixed annual pounds and pence increase terms. We will publish a full assessment of the impact of the new rules in 2027.

Most out-of-contract customers can save money by re-contracting or switching provider

- **In-contract customers typically pay less than out-of-contract customers.** This was the case for most standalone services and bundle types, with average in-contract customer savings ranging from £7 to £9 per month for standalone broadband, dual-play (fixed broadband and fixed voice), and triple-play (fixed broadband, fixed voice, and pay TV) bundles.

- **Switching or re-contracting enables customers to reduce their bills with little effort.** The difference between the promoted prices (paid by in-contract customers) and list prices (paid by out-of-contract customers) for dual-play bundles ranged from £4 for those with standard broadband to £8 for those with ultrafast broadband, indicating that savings are available for those who act when their contract ends. Over two million households have used the new, simplified, One Touch Switch broadband switching process since its launch in September 2024, and the Auto-Switch process makes it quick and easy for people to switch their mobile provider with a simple text message.

Customers can reduce what they pay by making changes to their services

- **Bundled services:** Buying communications services together in a bundle, rather than separately, remains cheaper for most households. Our analysis of the prices of services for four 'typical' household types found that bundling was cheaper for three of them, providing average monthly savings ranging from £26 to £48 (25% to 37%).

- **Mobile airtime:** SIM-only plans are gaining in popularity, accounting for half of pay-monthly subscriptions in June 2025. While pay-monthly tariffs offer lower prices for those requiring larger amounts of data, pre-pay can offer better value for those requiring 2 GB of data per month or less, with monthly savings of up to £2 or 19%.

- **Mobile handsets:** It can be significantly more expensive to buy a handset and airtime together from a mobile provider than to buy a SIM-only service and use it with a separately purchased handset. A comparison of plans including an iPhone 17 finds that it can typically cost over £8 per month more on average to acquire the handset in this way (or £200 over a 24-month contract).

- **Fixed voice:** In Q2 2025, 70% of households which bought their broadband and fixed voice together did not make an outgoing call. Many of these customers could save by switching to a standalone broadband service, which typically costs about £7 a month less than broadband with a landline.

- **Pay TV:** Taking a traditional pay TV service (such as those offered by Sky and Virgin Media) as part of a bundle has become cheaper. The estimated average monthly list price of pay TV when bought in a triple-play bundle declined by 15% to £21 in real terms in the year to September 2025, while the average promoted price fell by 23% to £12.

- **SVoD:** Prices rose for Netflix, Disney+ and Apple TV in the year to September 2025, while NOW Entertainment and Amazon Prime Video's prices were unchanged in nominal terms (and fell in real terms). Most SVoD services offer rolling monthly subscriptions which offer users flexibility in the services they take, and some have ad-supported plans at lower prices.

Shopping around can identify cheaper providers

- **Smaller providers and budget brands frequently offer lower prices.** In the four years to September 2025, the largest operators' main brands tended to be more expensive than smaller providers' for dual-play superfast fixed broadband and fixed voice bundles, and SIM-only mobile services.

- **Lower prices are often available in areas where newer full-fibre providers have a presence.** As a market entry strategy, altnets offering retail services often set lower prices than established broadband providers to attract customers. Our analysis suggests that, over the past year, prices offered by larger established providers have fallen.

Fixed broadband switching has increased, and most customers are happy with their current deal

- **Overall switching levels are stable, with a quarter of UK homes having changed provider for at least one communications service in the past year.** Eighteen per cent of broadband customers have switched provider, up by 4pp since 2023 as the availability and choice of full-fibre services has increased, and supported by the 'One Touch Switch' process. Mobile switching has remained steady, and pay TV switching has grown. Our research also shows that 35% of households engaged with the market in the past year by negotiating a new deal with their current provider or making changes to one or more of their existing service/s.

- **Switching rates are lower for older consumers and those in lower socio-economic groups.** Only 19% of over-64s had switched any service in the last 12 months compared to 29% of 25-44s, while 21% of those in DE households had switched any service compared to 27% of those in AB households. This may be partly due to lower confidence in engaging with the market: our consumer research shows that older people and those in lower socio-economic groups were less confident in comparing the costs of various deals.

- **Most broadband, fixed voice, mobile, TV, and/or dual-and triple-play bundle customers are happy with their current deal.** Most feel confident they are on the best deal for them and say they would stay put even if savings were possible. Many people say the amount they pay for their service is small compared to other household bills and/or believe the gains from switching would be too small to justify the effort. These attitudes help explain the stable switching levels seen for some services, including for mobile, despite increased choice and easier switching.

Social tariff use is rising, but take-up remains low

- **The choice of social tariffs has increased.** Broadband social tariff options had grown from just three in 2020 to more than 30 by December 2025. These offer broadband for £12.50 to £24 a month and mobile for £10 to £12 a month. Low-cost standard SIM-only deals are also available and in some cases are cheaper than the available social tariffs.

- **More people are taking up social tariffs.** In June 2025, 532,000 customers were using a fixed or mobile broadband social tariff, an annual increase of 26,000 (5%). However, awareness and take-up are a challenge: 70% of eligible households were unaware of social tariffs in October 2025, and take-up is low as a proportion of eligible households (less than 9%).

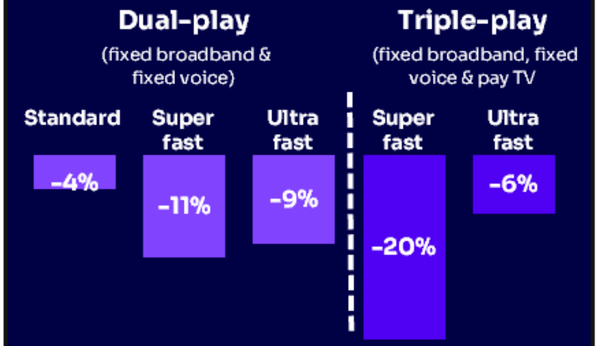
- **Customer arrears, disconnections, and debt have remained low and stable over the past three years.** Seven per cent of fixed broadband households and 5% of those with a mobile phone found it difficult to afford their service in October 2025. Between 0.6% and 0.7% of fixed telecoms customers, and 1.0% and 1.1% of mobile contracts, had missed two or more regular payments between July 2024 and June 2025, similar to the previous two years. Disconnections for non-payment were also stable in the first half of 2025, at about 1.0% for fixed telecoms (around 250,000 customers) and 1.1% for mobile services (around 510,000 mobile contracts).

Key metrics

Broadband services (CPI-adjusted)

Bundle prices are falling

Change in average list prices: year to Sept 2025



Standalone fixed broadband

Number of households taking standalone broadband (end June of each year)

70% of households with a fixed voice service included with their broadband did not make an outgoing call in Q2 2025.

Households that do not need a fixed voice service can save money by buying standalone fixed broadband. Doing this rather than buying a broadband & fixed voice bundle would reduce costs by an average of **13%** of the list price and **18%** of the promoted price in September 2025.

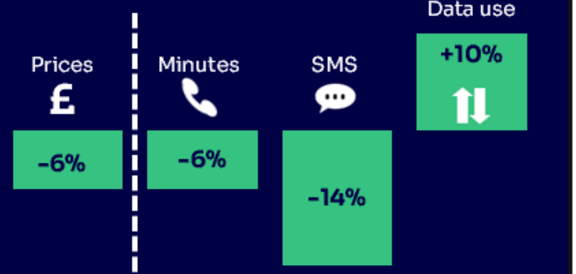
Price differentials (CPI-adjusted)

Savings are still available to people who engage with the market when their contract ends.

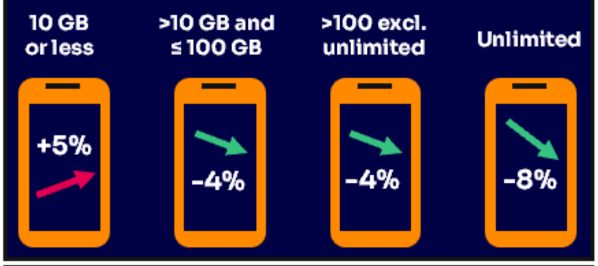
	September 2024	September 2025
Broadband & fixed voice	£7.15 per month	£7.38 per month
Broadband, fixed voice & pay TV	£19.23 per month	£18.99 per month

Mobile services (CPI-adjusted)

Change in average mobile use and prices from 2024 to 2025



Average prices available to new customers for SIM-only pay-monthly mobile services from 2024 to 2025:



Households with home broadband affordability issues

7% of households reported issues affording their home broadband service in October 2025, ↓ 1 percentage point vs October 2024.

Social tariffs

The number of households taking a fixed social tariff increased to **532k** in June 2025, ↑ from **506k** in June 2024.

Disconnections for non-payment

1.1% of mobile customers were disconnected for non-payment in H1 2025 (↓ **0.1pp** YoY).
1.0% of fixed telecoms customers were disconnected for non-payment in H1 2025, **unchanged** YoY.

Switching and consumer engagement

Helping consumers engage with the market

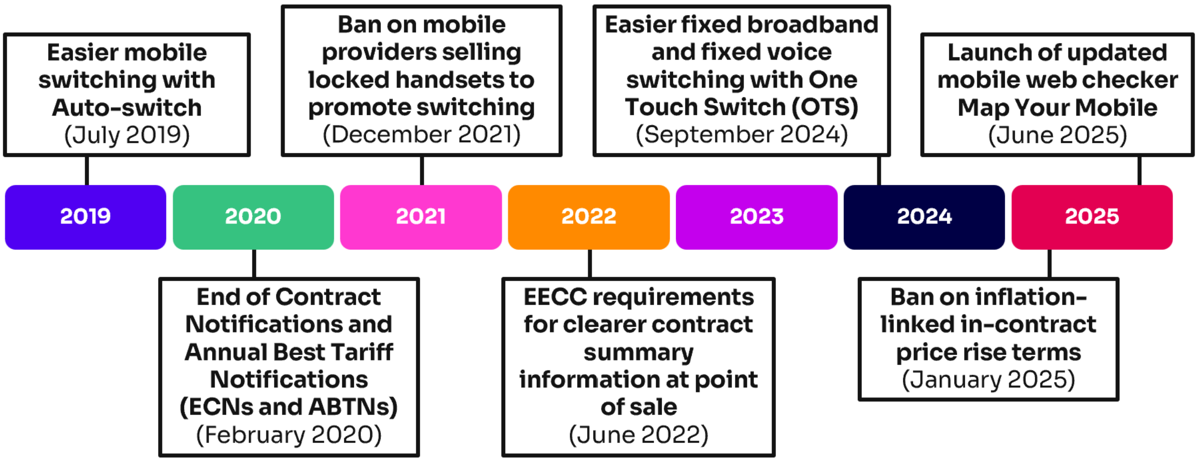
We believe that customers should get a fair deal for their communications services and we want people to shop around with confidence, make informed choices and switch easily. As highlighted throughout this report, customers who engage with the market and switch provider, or re-contract with their existing provider at the end of their service's minimum contractual period, rather than roll onto its more expensive list price (commonly referred to as the out-of-contract price) can usually save money.

Ease of switching is crucial for effective competition, as it empowers consumers to choose the service that best meets their needs, and encourages providers to compete fiercely on price, quality and innovation. It is also important in supporting competitive investment, such as faster and more reliable broadband networks. When consumers can easily switch providers, this prevents firms from exploiting customers, rewards those with the best offers, and helps ensure that a market remains dynamic and competitive.

Not all customers need to switch regularly for a market to be competitive. If a reasonable proportion of customers are switching provider or entering the market as new customers, and customers do not stay out of contract for long periods, there is an incentive for providers to compete strongly for new custom, leading to the market being competitive for all. This is why we look at measures of consumer engagement in conjunction with switching rates.

Ensuring customers can switch easily is a long-standing priority for Ofcom, and we have put in place a number of reforms to help achieve this and encourage customers to engage with the market.

Figure 1: Timeline of recent Ofcom reforms to promote consumer engagement and switching



Source: Ofcom

Our reforms help customers engage with the market

Ofcom's 2025 Switching Tracker shows that over half of fixed broadband, fixed voice, mobile phone, pay TV, and dual- and triple-play bundle consumers were engaged in the market, either as 'active' participants or 'browsers',[1] and about a quarter of households have switched at least one of their communications providers in the past year.

For some consumers, a lack of active engagement in the market may reflect that they are happy with their current service/s or that the perceived benefits of switching are not significant enough to justify the time spent exploring alternatives, despite the low barriers to switching. For those who do want to switch, Ofcom's reforms have made the switching process easier, making it simpler for consumers who wish to change provider to do so confidently.

We have also made it easier to engage in the market by requiring providers to send their customers end-of-contract notifications and annual best-tariffs notifications (for those out of contract).

Under these rules, providers must contact customers via text, email or letter between ten and 40 days before their contract comes to an end and tell them that this is happening. These end-of-contract notifications (ECNs) must tell the customer:

- the date at which their contract ends;
- what they are currently paying and what they will pay after their contract ends;
- any notice period they must give their current provider, if they decide to leave; and
- their current provider's best deals, including any prices available only to new customers.

Similarly, providers must send any customer who remains out of contract an annual best-tariff notification (ABTN) every year, reminding them that they are out of contract and telling them about their best deals.

Our review of the impact of ECNs concluded that, following their introduction, there was an increase in engagement among broadband customers, including an increase of between 8 and 13 percentage points in the proportion of customers re-contracting with their broadband provider.

We have also made it easier for consumers to understand what services are available in their area, and therefore what their switching options are:

- we recently introduced an updated mobile checker, Map Your Mobile, which not only lets consumers compare the mobile networks' coverage in their area, but also the performance of each network; and
- our Broadband Checker shows which providers have fixed broadband network infrastructure where they live and the types of service that are available to them.

Broadband, fixed voice and mobile customers can switch easily

One Touch Switch broadband and fixed voice switching

In September 2024, a new switching process for all residential broadband and fixed voice services called 'One Touch Switch' (OTS) was introduced, making it easier and quicker for customers to

[1] Our Engagement Index categorises people as being "Active" if they have switched supplier in the last year (unless when moving home) OR at least two of the following; (i) are currently/planning to look for a new deal; (ii) have initiated some supplier contact; and/or (iii) have conducted some competitor evaluation. "Browsers" are defined as people who do not meet the criterion for "active" but; are currently/planning to look for a new deal, OR have initiated some supplier contact, OR conducted some competitor evaluation. See the Annex for more details.

switch without the hassle of having to speak to their current provider to cancel, and to avoid double paying, especially when switching networks. Under OTS, customers who want to switch simply need to provide a few details to their chosen new provider, including their address and the name of their current provider, and the new provider arranges the switch for them.

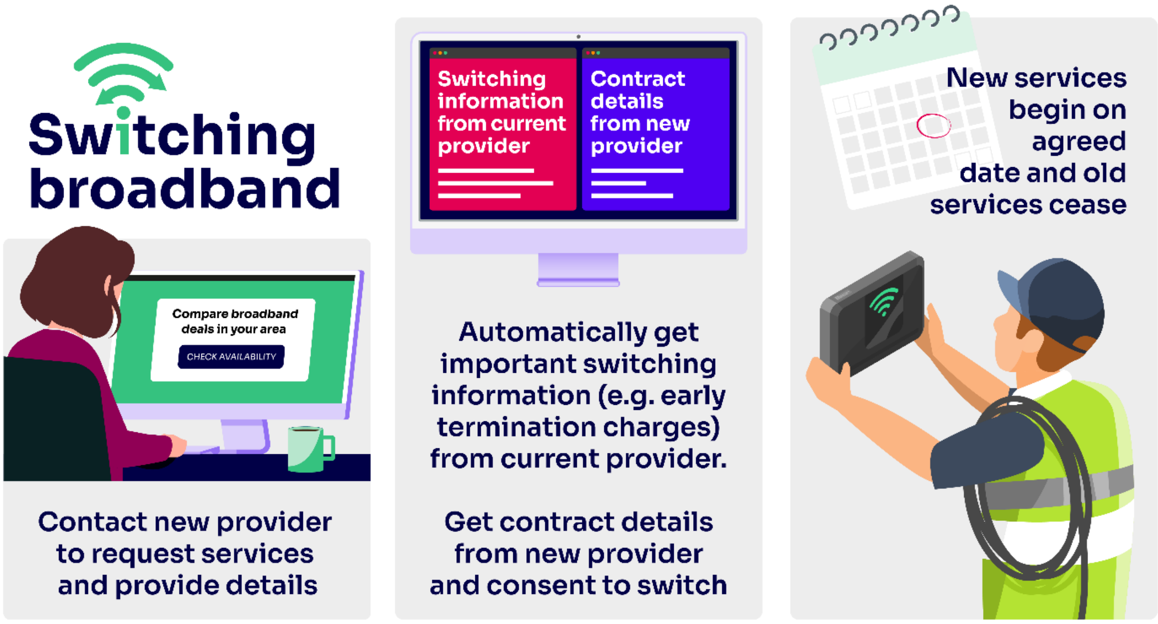
Customers have been able to switch between providers that use Openreach's network, such as BT, Sky and TalkTalk, in a similar (gaining provider-led) way since 2015. But with OTS all fixed voice and broadband customers now benefit from the same, simple process, including those switching to (or from) services provided by Virgin Media and providers using altnet full-fibre networks, which cover millions of UK homes.

Once the current provider confirms that the customer's details match their records, they must promptly send the customer clear information about the implications of going ahead with the switch. This must include the details of any early termination charges that are due, or the impact of the switch on any other services they currently receive. If the customer decides to proceed with the switch, the new provider arranges this on their preferred switching date, where technically possible.

Under OTS, customers do not have to pay notice-period charges beyond the switch date; before this, they could find themselves continuing to pay for the old service after the new one had started. Also, under the new rules, providers must compensate customers if things go wrong with the switch or they are left without a service for more than one working day.

From its launch in September 2024 to the end of 2025, over two million customers used OTS to switch their broadband and/or fixed voice provider, with some customers completing their switch in as little as one day. This is a significant improvement which gives consumers more control over when their services are switched and what they will pay.

Figure 2: Summary of the consumer's switching process under One Touch Switch



Source: Ofcom

Auto-Switch mobile switching

Ofcom's rules also allow customers to change mobile provider smoothly – keeping their phone number – without the hassle of speaking to their current provider. Customers simply text 'PAC' to 65075, or request a switching code online or by telephone. The customer can give this Porting Authorisation Code (PAC), which is valid for 30 days, to their chosen new provider, which will arrange the switch for them. For customers who want to switch mobile providers but do not want to keep their phone number, a Service Termination Authorisation Code (STAC) can be used in the same way. It can be requested by texting 'STAC' to 75075.

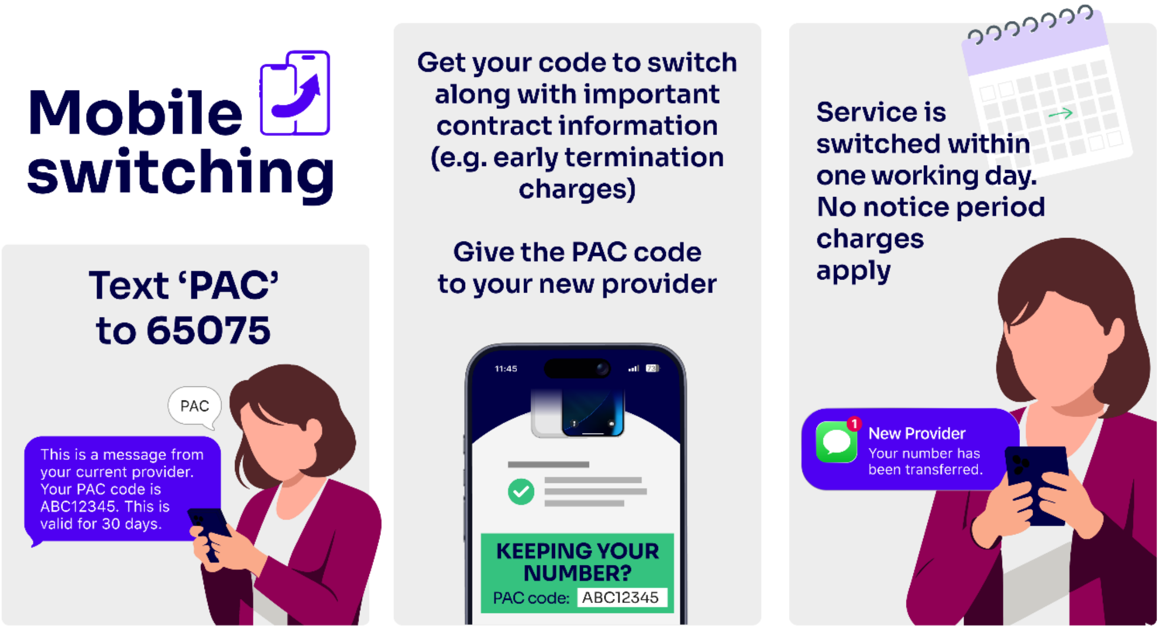
The losing provider must send the PAC or STAC to the customer within one minute of their request, and at the same time provide clear information regarding the implications of the customer's decision to go ahead with the switch. Again, this includes any early termination charges, and details of the impact of the switch on any separate handset contract or bundled services.

Mobile customers who switch provider must not be required to pay any notice period charges beyond the date of the switch, and they must be compensated if things go wrong.

Once the customer decides to go ahead and provides the PAC or STAC, the switch must take place within one working day – or where possible on the date requested by the customer – making mobile switching quick and efficient.

Our 2023 evaluation of our Auto-Switch reforms showed that an additional 0.6 million customers switched providers in the 12 months following the implementation of the reforms. Moreover, a greater share of customers than we had expected used Auto-Switch (71% vs 51%). As a result, the customer savings (including those resulting from banning notice period charges, as well as time and effort) are estimated to be £130m over the ten years following the introduction of Auto-Switch (c.£15m more than originally anticipated).

Figure 3: Summary of the consumer's switching process under Auto-Switch



Source: Ofcom

Monitoring switching and how consumers engage in the communications market

Since 2020,[2] Ofcom's Switching Tracker has monitored consumer behaviour within the communications market, which includes fixed broadband, fixed voice, mobile and pay TV.

A quarter of UK households have switched provider for at least one communications service in the past year[3]

Twenty-six per cent of UK households reported switching provider for at least one of their communications services in the past year.

Looking at overall rates by communications service (i.e. including services bought as part of a bundle and those purchased on a standalone basis), switching was highest among fixed broadband customers (18%), followed by mobile phone (16%) and pay TV (13%), with switching rates among fixed voice customers at 11%. About one in ten triple-play[4] bundle (10%) and dual-play[5] bundle customers (11%) switched one of their bundled services in the 12 months prior to the fieldwork.

Taking a longer-term view, the proportion of households switching any of their communications services has remained consistent since 2020, although there have been changes for some individual services. Across all fixed broadband customers (again, including those buying it with other communications services as part of a bundle) the switching rate increased from 14% in 2023 to 18% in 2025, having been stable from 2020 to 2023.

This increase is likely to have been driven by customers having a greater choice of services following the roll-out of new full-fibre broadband networks, as well as the switching process becoming easier with the introduction of One Touch Switch, which was used by over 2 million customers between its September 2024 launch and the end of 2025.

While the switching rate for any pay TV[6] service has also increased since 2020 (from 7% to 13%), the proportion of households purchasing pay TV services declined during this period (from 58% in 2020 to 41% in 2025),[7] partly driven by increased competition from subscription video-on-demand services [8] and the increase in viewing of free streaming video services such as YouTube.[9]

[2] Ofcom's Switching Tracker ran annually from 2020-2023, when it moved to a biennial tracker. As such, throughout this report there is no Switching Tracker data for 2024.

[3] Fieldwork for the 2025 Switching Tracker took place between August and September 2025 among 2,767 respondents, all of whom were decision-makers for at least one communications service (i.e. landline, fixed broadband, mobile and/or pay TV). Except for mobile, the survey predominantly covers household communications services; as such, Switching Tracker respondents are considered as representatives of their households.

[4] Triple-play bundles refer to fixed broadband, landline and pay TV services bought from the same provider.

[5] Dual-play bundles refer to fixed broadband and landline services bought from the same provider.

[6] Pay TV excludes Subscription Video on Demand (SVoD) services.

[7] Ofcom Technology Tracker, 2020-2025. Base: All respondents.

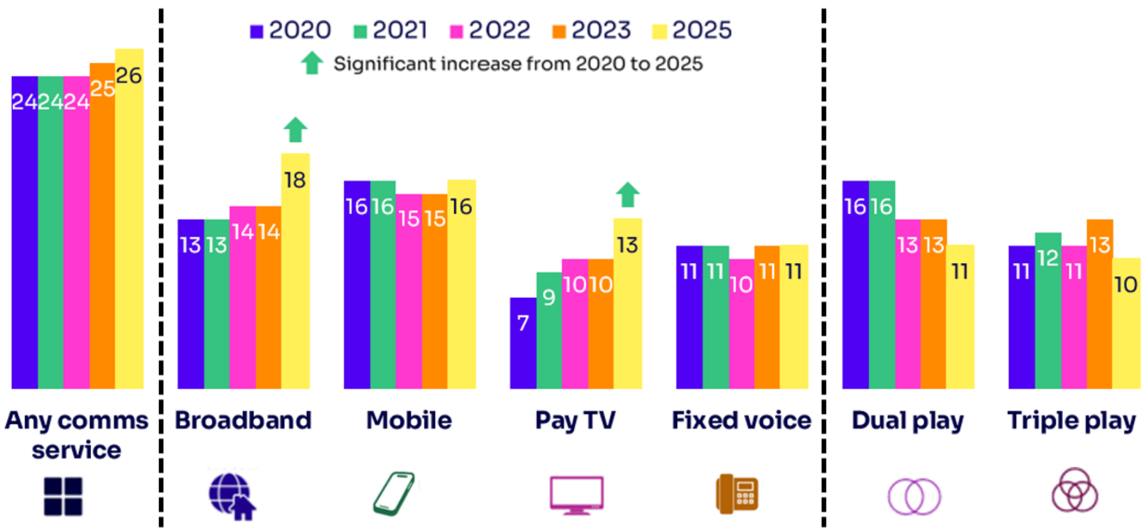
[8] Barb Establishment Survey, Q3 2025: 69% of UK households had at least one subscription on-demand service. This compares to 61% in Q3 2020.

[9] Barb (Base: All individuals aged 4+): YouTube was watched via broadband in the home for an average of 41 minutes per person per day in 2025. This is an eight-minute increase from only three years before, and the TV set is now the most-used device for viewing YouTube in the home.

Rates of mobile phone switching have remained stable, and in 2025 were consistent across contract types (pre-pay and pay-monthly) and for standalone and bundled services. Rates of switching for fixed voice, dual-play and triple-play bundles in 2025 have been consistent since 2020.

However, take-up of fixed voice services has decreased significantly since 2020 (from 78% to 40%) with mobile phone use having become almost universal, and there are indications that dual-play and triple-play bundling has declined as a result in recent years.[10]

Figure 4: Proportion of households switching provider in the past 12 months: 2020-2025[1]



Source: Ofcom Switching Tracker, 2020 – 2025 (fieldwork conducted August-September each year).
Base: All adults aged 16+ who are the decision makers for each / any service (ordered from 2020, 2021, 2022, 2023, 2025). Fixed broadband (2508, 2602, 2673, 2139, 2020), mobile phone (2862, 3062, 3008, 2363, 2345), pay TV (1338, 1413, 1350, 947, 967), landline (2020, 2156, 2095, 1436, 999), dual-play bundle (885, 933, 915, 674, 361), triple-play bundle (563, 549, 511, 376, 249), any comms service (3128, 3420, 3334, 2717, 2767).
Notes: [1]For each service, the % switched is among decision makers for that service. For broadband, mobile, pay TV and landline %, this includes standalone and bundled purchases. For the 'switched any comms service' the % switched is among decision makers of any service. indicates a significant difference at 99% confidence compared to 2020. The direction of the arrow indicates the direction of significance.

Switching rates for services bought in a bundle tend to be lower than for those purchased on a standalone basis

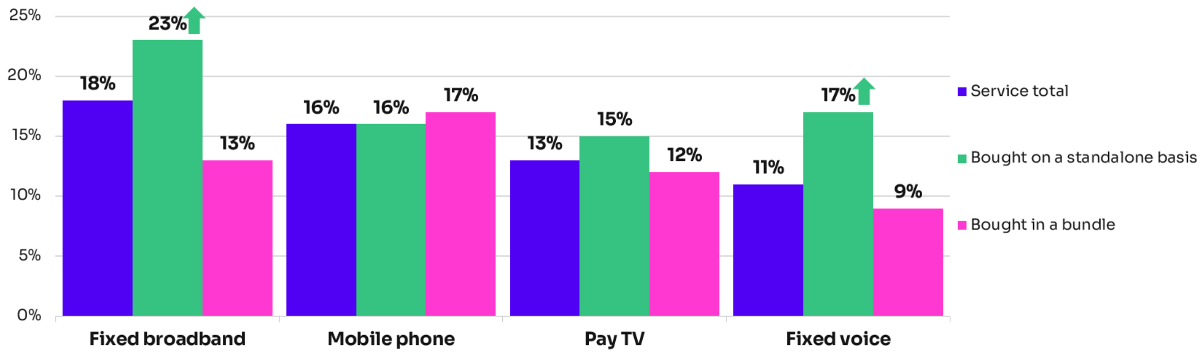
In 2025 switching rates were lower for customers who purchased their service as part of a bundle than for those who bought it on a standalone basis for fixed broadband (13% bundled vs 23% standalone) and fixed voice services (9% bundled vs 17% standalone). There were no such differences for mobile phone and pay TV services, for which bundled and standalone switching rates were similar.

The main benefits to customers of bundling communications services are the convenience of having a single bill/payment for multiple services, and because it is typically cheaper than buying them separately. Over half of consumers (57%) agreed that taking multiple services from one provider as part of a bundle meant that they could expect a better deal.

[10] Ofcom Technology Tracker, 2020-2025. Base: All respondents.

However, while bundle customers may benefit from lower prices and greater convenience, bundling may mean that they are less likely to switch provider and could, potentially, miss out on better deals. About half of consumers (49%) agreed that taking multiple services from one provider makes it more complicated to look for a cheaper deal elsewhere.

Figure 5: Proportion of households that switched provider in the past 12 months, by those with a standalone service and those with a bundled service: 2025



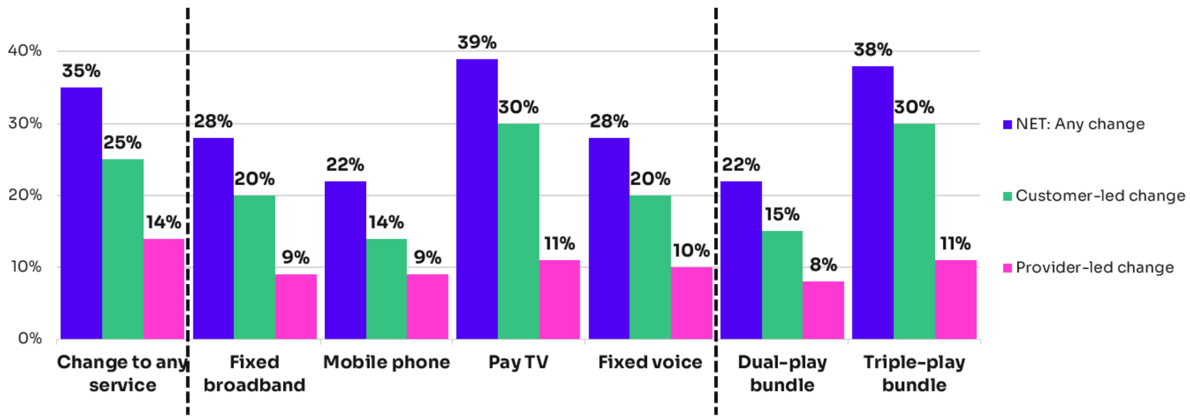
Source: Ofcom Switching Tracker, 2025 (fieldwork conducted August-September each year).
Base: All adults aged 16+ who are the decision makers for each service (total, standalone, bundle). Fixed broadband (2020, 877, 1143), mobile phone (2345, 1946, 399), pay TV (967, 341, 626), landline (999, 206, 793).
Notes: ⬆ indicates a significant difference (at 99%) between switching rates for standalone and bundled products for that service only. The direction of the arrow indicates the direction of significance.

Rather than switching provider, some customers make changes to existing services or renegotiate with their current provider

In addition to switching provider, customers can engage with the market by making changes to their current service/s or negotiating new deals with their current provider/s. Our research shows that 35% of UK households made one of these changes to at least one of their communications services in the past 12 months. This was highest for pay TV (39%) customers, and lowest for mobile phone customers (22%), while about four in ten triple-play bundle customers made a change in the last 12 months (38%) compared to 22% of dual-play bundle customers.

Across all services, customers were more likely to have received a discount on their current service or package than to have improved or added extra services, or downgraded or reduced their services.

Figure 6: Proportion of households that made changes to existing services/packages in the past 12 months: 2025 [1, 2]



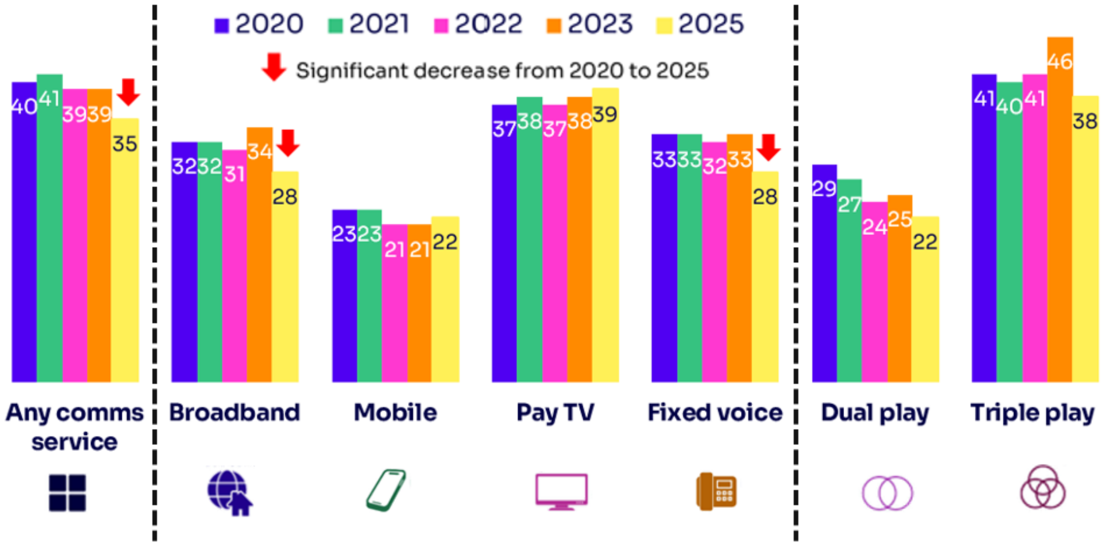
Source: Ofcom Switching Tracker, 2025 (fieldwork conducted August-September).
Base: All adults aged 16+ who are the decision makers for each / any service. Fixed broadband (2020), mobile phone (2345), pay TV (967), landline (999), dual-play bundle (361), triple-play bundle (249), any comms service (2767).
Notes: [1] For each service the % is among decision makers for that service. For the 'made change to any comms service' row, the % is among decision makers for any service. [2] 'Any change' refers to the proportion of decision makers who made any change to their service, either customer or provider-led (net score). The 'any change' % is not equal to the sum of customer-led and provider-led changes, as customers can make both types of changes to their services.

There has been a decline in the overall proportion of customers making changes or renegotiating with their provider since 2023

The overall proportion of households making any changes to existing communications services (such as upgrading or downgrading elements of their package) declined from 39% in 2023 to 35% in 2025, due to fewer households making customer-led changes (down from 30% in 2023 to 25% in 2025), having been stable from 2020 to 2023. This may be related to increases in the proportions of fixed broadband, fixed voice, mobile, and pay TV customers who said that they were happy enough with their current deal, as outlined later in this section.

There was some variation across services over a longer period, with fixed broadband and fixed voice customers less likely to make changes to their services in 2025 than in 2020. Rates of changes for all other services have remained stable.

Figure 7: Proportion of households that made changes to, or received a discount for, existing service/package in the past 12 months: 2020 to 2025 [1,2]



Source: Ofcom Switching Tracker, 2020 – 2025 (fieldwork conducted August-September each year).
Base: All adults aged 16+ who are the decision makers for each / any service (2020, 2021, 2022, 2023, 2025). Fixed broadband (2508, 2602, 2673, 2139, 2020), mobile phone (2862, 3062, 3008, 2363, 2345), pay TV (1338, 1413, 1350, 947, 967), landline (2020, 2156, 2095, 1436, 999), dual-play bundle (885, 933, 915, 674, 361), triple-play bundle (563, 549, 511, 376, 249), any comms service (3128, 3420, 3334, 2717, 2767).
Notes: [1] For each service the % is among decision makers for that service. For the 'made change to any comms service' rows, the % is among decision makers for any service. [2] 'Made any change to any service' refers to the proportion of decision makers who made any change to their service, both those led by the customer and those led by the provider (net score). ⬇ indicates a significant difference at 99% confidence compared to 2020. The direction of the arrow indicates the direction of significance.

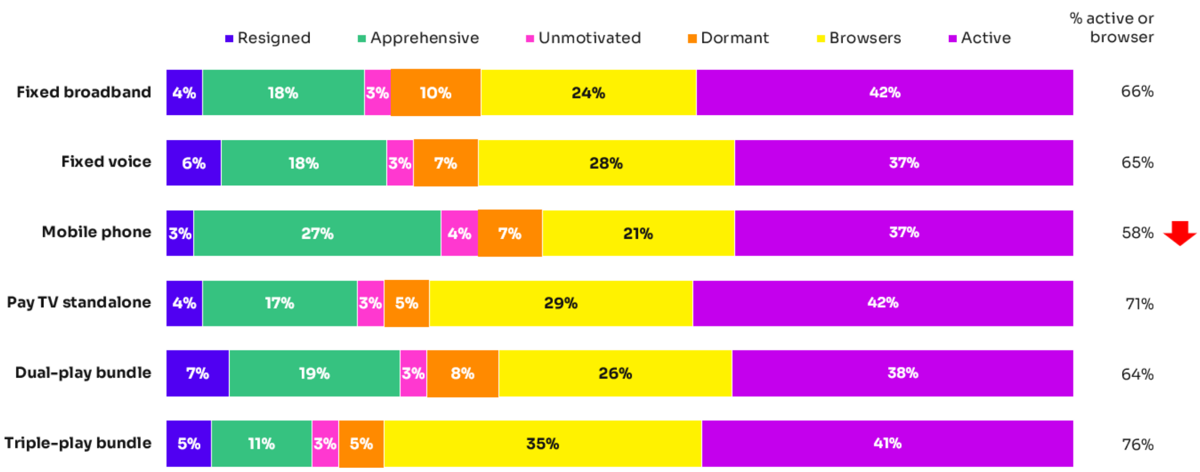
Our engagement index segments customers by their confidence in engaging with the market and the actions they take

To inform their decisions on whether to switch providers, customers can find out about the services and prices available to them, including both what their existing provider offers and what is available if they switch to a new provider. To effectively navigate the market, customers need confidence in understanding the language and terminology used by providers, speaking to providers about new deals, and comparing the costs of various offers.

Our Switching Tracker asks about these different aspects, and from the responses we categorise customers into levels of engagement (termed the 'engagement index'). This classifies customers as 'active', 'browsers', 'dormant', 'unmotivated', 'apprehensive' or 'resigned' based on both their recent behaviours and their confidence in navigating the market. Annex 1 sets out our methodology and how we define each segment.

For all services, most customers were classified as either 'active' or 'browsers'. The proportion falling into one of these segments was largely consistent across services, ranging from 64% to 76% except for mobile (58%), where engagement was lower compared to other services. Engagement levels were also consistent with previous years; the only statistically significant change since 2023 was a decline in the proportion of standalone fixed broadband 'browsers' (from 24% to 18%), which may reflect the higher rates of switching for this service over time, and lower rates of non-switching changes.

Figure 8: Engagement index by communications service/package: 2025



Source: Ofcom Switching Tracker, 2025 (fieldwork conducted August-September).
Base: All adults aged 16+ who are the decision makers for each service. Fixed broadband (2020), mobile phone (2345), pay TV (967), landline (999), dual-play bundle (361), triple-play bundle (249).
Notes: indicates a significant difference at 99% confidence compared to other services. The direction of the arrow indicates the direction of significance.

While most customers are confident in navigating the market, levels are lower among some groups

Most customers reported feeling confident[11] engaging with different aspects of the communications market, such as comparing service costs (77%) and options (71%), understanding the language and terminology used by providers (70%), and discussing new deals with providers (74%).

Sixty-three per cent of fixed broadband customers were confident in their understanding of the difference between full-fibre and part-fibre broadband services, probably reflecting the rate of recent change in the broadband market and the range of options now available. In September 2024, we introduced new Ofcom guidance around clearer broadband information to support consumers when they engage with the market. Under the guidance, broadband providers need to be clear and unambiguous about whether the broadband packages they offer are provided using a full-fibre or a part-fibre network. Providers can no longer use the term 'fibre' on its own to describe the underlying technology being used to provide the service to avoid any misunderstanding about the specific product on offer.

Despite relative confidence in navigating the market, some customers still had concerns about the switching process and possible loss of service. Over half agreed with the statements 'the risk of being without service while changing puts me off looking for alternative providers' (54%) and 'I would worry about things going wrong if I changed provider' (55%).

Confidence navigating the market varied by age, gender and socio-economic group. Apart from 'speaking to my provider about new deals', those aged 65+ were less confident than average for all statements. Men were more confident, and women less confident, for 'understanding the language and terminology used by providers' (77% and 62%), 'understanding the different options for the services in the market' (77% and 65%) and 'understanding the difference between full-fibre and part-fibre broadband services' (76% and 50%).

Those classified as being in the AB socio-economic group were more confident than average in speaking to their provider about new deals (80%), understanding the language and terminology of providers (76%) and understanding the difference between fibre broadband services (70%). Conversely, those classified as DE socio-economic group were less confident than average in understanding the language and terminology used by providers (64%) and understanding the difference between full- and part-fibre services (56%).

[11] Confidence figures are the % of customers who stated they were very/fairly confident with the statement based on a 5-point answer scale (Not at all, not very, fairly, very, don't know).

Figure 9: Confidence engaging with the communications market, by total sample, age, gender and SEG: 2025

% fairly / very confident with statement	Comparing the costs of various deals available in the market	Speaking to your current provider about new deals	Understand-ing the different options for services in the market	Understand-ing the language and terminology used by providers	Understand-ing the difference between full- and part-fibre broadband [1]
Total	77%	74%	71%	70%	63%
16-24	76%	67%	67%	67%	68%
25-44	82% ↑	78%	79% ↑	75% ↑	68%
45-64	78%	76%	72%	70%	62%
65+	65% ↓	69%	57% ↓	57% ↓	54% ↓
Men	80%	77%	77% ↑	77% ↑	76% ↑
Women	74%	72%	65% ↓	62% ↓	50% ↓
AB	81%	80% ↑	75%	76% ↑	70% ↑
C1	79%	73%	70%	69%	63%
C2	76%	74%	74%	67%	63%
DE	72%	70%	67%	64% ↓	56% ↓

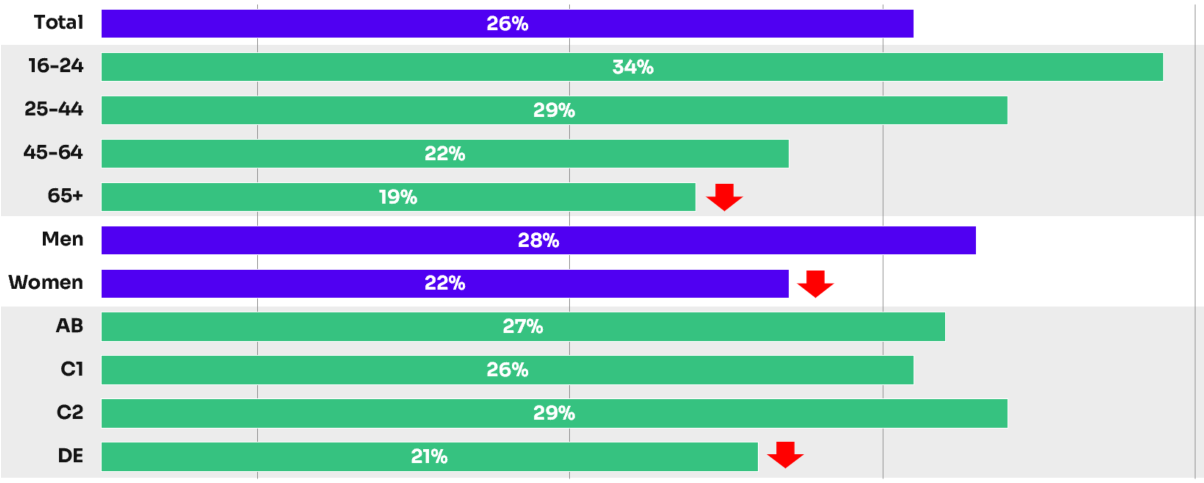
Source: Ofcom Switching Tracker, 2025 (fieldwork conducted August-September). Base: All adults aged 16+ who are the decision makers for any service. Total (2767), 16-24 (330), 25-44 (1049), 45-64 (915), 65+ (468), Men (1412), Women (1326), AB (826), C1 (756), C2 (504), DE (633). All adults aged 16+ who are the decision maker for the household broadband service. Total (2020), 16-24 (137), 25-44 (746), 45-64 (752), 65+ (382), Men (1042), Women (961), AB (642), C1 (581), C2 (341), DE (432).
Notes: [1] Only decision-makers for the household's broadband service were asked to rate their level of confidence in understanding the difference between full- and part-fibre broadband. ↑ indicates a significant difference at 99% confidence between the sub-group and the total sample. The direction of the arrow indicates the direction of significance.

Lower confidence for certain consumer groups is reflected in lower rates of switching and engagement

Differences by age and gender in confidence navigating the market are reflected in switching rates; those aged 65+ (19%) and women (22%) were less likely than average (26%) to have switched provider for any of their communications services in the past 12 months. For those aged 65+, lower confidence was also reflected in lower rates of customer-led changes to their services compared to the average (17% vs 25%).

Among mobile customers, the research showed that younger respondents were more engaged than older ones. Those aged 16-24 (75%) and 25-44 (64%) were more likely to be classified as 'active' or 'browsers' than those aged 45-64 (52%) and 65+ (45%), compared to the average of 58%. There were no differences by age for any other service.

Figure 10: Switching rates for any service in the last 12 months, by age, gender and SEG: 2025



Source: Ofcom Switching Tracker 2025 (fieldwork conducted August to September 2025).
Base: All adults aged 16+ who are the decision makers for any service. Total (2767), 16-24 (330), 25-44 (1049), 45-64 (915), 65+ (468), men (1412), women (1326), AB (826), C1 (756), C2 (504), DE (633).
Note: ⬇ indicates a significant difference at 99% confidence between the sub-group and the total sample. The direction of the arrow indicates the direction of significance.

Price alone is not a driver to switch for all customers

Our research suggests that levels of switching partly reflect consumer satisfaction with their current deal and therefore a reduced motivation to change. Many customers were happy enough with their current deal and/or didn't feel the cost savings of switching were sufficient for them to explore alternative options.

Across all services, around three in five customers agreed that 'even if I could save money by getting a different deal for my [service], I am happy enough with my current deal' and agreement with this statement has increased since 2023 for fixed voice (from 58% to 65%), broadband (from 56% to 63%), mobile (from 67% to 71%) and pay TV (from 57% to 65%). Similarly, around three in five respondents said they were fairly or very confident that the deal they had for their service was the best deal for them (ranging from 59% to 79%).

In addition, for all services, about half of customers or more agreed that 'the savings I could make on my [service] would be too low to make it worth spending time looking for a better deal' (ranging from 48% to 65%).

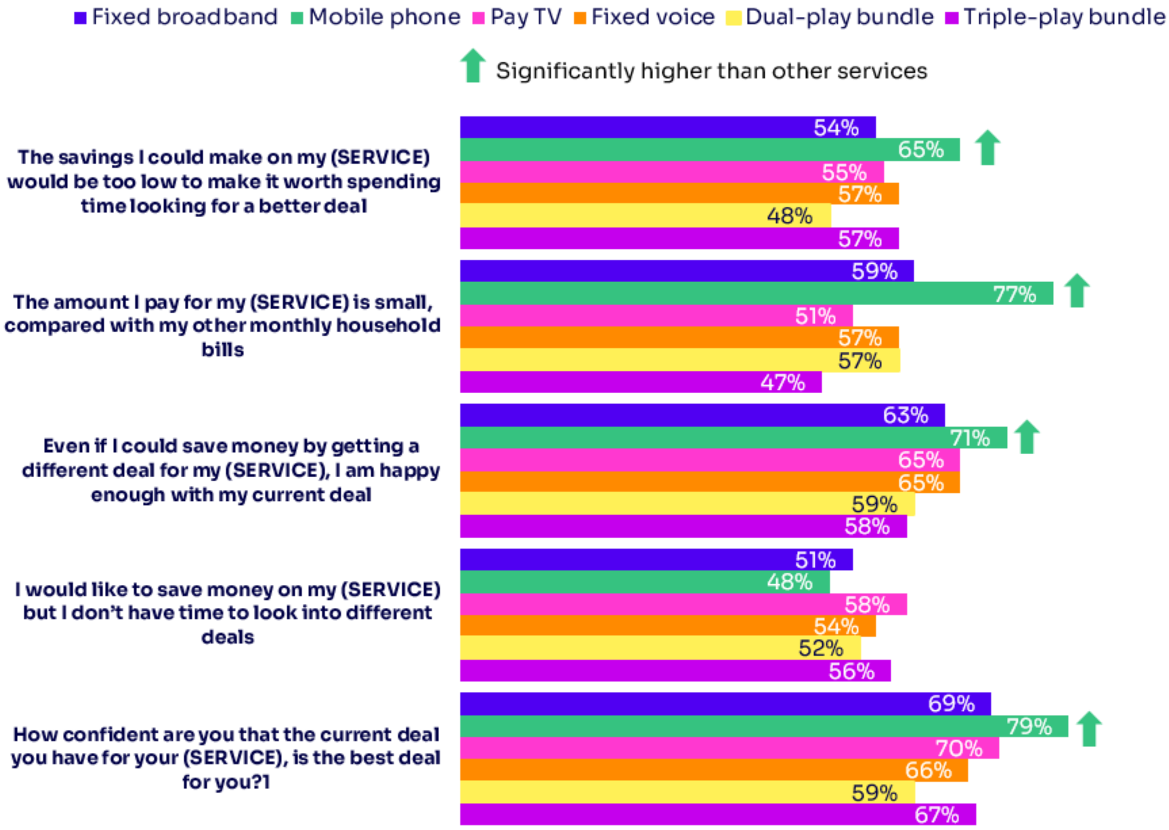
We consider this finding to be significant given that the barriers to switching are objectively very low, particularly with the various requirements which Ofcom has introduced in recent years, as discussed earlier in this document.

Attitudes toward switching mobile provider differed from other services; customers were more likely to agree that the amount they pay for their mobile service is low relative to other household bills, that they were confident they were on the best deal for them, and that even if they could save money, they were happy enough with their current deal.

Similarly, there was higher agreement that the savings they could make on their mobile service would be too low to make it worth looking for a new deal (possibly due to the widespread availability of low-priced mobile services). To give this some context, later in this report we use customer-level mobile data to show that average residential pay-monthly SIM-only mobile spend was around £18 per month in Q2 2025 and many customers will pay less than this.

Alongside satisfaction with the price of their deal, our Customer Satisfaction Tracker data[12] shows that most mobile, broadband, fixed voice and pay TV customers were satisfied with their overall service,[13] with only a small minority dissatisfied. This may also be contributing to the stability of switching rates over time.

Figure 11: Agreement with statements about services: 2025



Source: Ofcom Switching Tracker, 2025 (fieldwork conducted August-September).
Base: All adults aged 16+ who are the decision makers for each service. Fixed broadband (2020), mobile phone (2345), pay TV (967), landline (999), dual-play bundle (361), triple-play bundle (249).
Notes: [1] shows the % who selected 'fairly / very confident' for this statement on a 5-point scale. ⬆ indicates a significant difference at 99% confidence compared to other services. The direction of the arrow indicates the direction of significance.

Overall, switching is simple and easy and consumers are engaged

Consumers benefit most in the communications market when they are informed, engaged and able to switch providers without difficulty. Ofcom has embarked on significant reforms over the last few years to remove barriers to switching, both in terms of process and to aid consumer knowledge and transparency. Our rules are designed to empower customers to make confident choices and switch provider quickly and easily. Both One Touch Switch and Auto-Switch are simple and easy to use and give control to the consumer over the timing of their switch, while notifications such as ECNs and ABTNS give consumers the information they need to engage with the market.

[12] Customer Satisfaction Tracker 2024.
[13] Satisfaction is a net score of the proportion of customers who said they were 'fairly' or 'very' satisfied with the overall service from their provider. 2024 scores for each service: mobile (88%), broadband (84%), pay TV (83%), landline (73%).

Whilst switching behaviour varies across services, over a quarter of UK households have switched at least one communications provider in the past year. This is a sign of an active market, in which about three-quarters of consumers say they are confident to engage, although some customers still had concerns about the switching process and possible loss of service. Consumer engagement is also strong, although our research suggests that some customers may choose not to switch because they are satisfied with their current deal or feel the potential savings are too small to justify the perceived effort, particularly in mobile markets where prices tend to be lower.

Overall, the market continues to be shaped by the balance between ease of switching, consumer confidence, satisfaction with existing services, and the growing choice of broadband and mobile options available to consumers.

New rules on in-contract price rises

Where contracts include price rises, providers must set them out clearly in pounds and pence

In January 2025, new rules came into force which prohibit inflation-linked or percentage-based price rises from being written into new contracts. Instead, the rules require providers to set out clearly and prominently at the point of sale, in pounds and pence, specified price rises that they will apply during a customer's contract. This was in response to a widespread practice since 2020, in which most major UK residential telecoms and pay TV providers introduced inflation-linked in-contract price rise terms with an additional fixed percentage (for example, that prices would increase by "CPI plus 3.9%" each year).

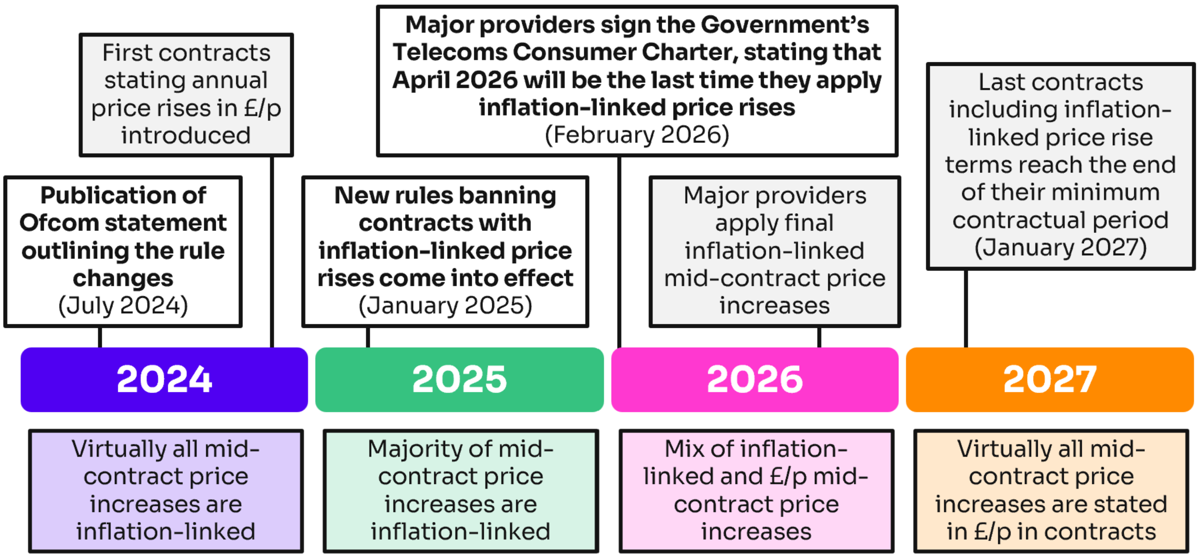
We introduced the new rules following a review which found that inflation-linked price rises create uncertainty for consumers, since price increases during the contract's lifetime are typically calculated annually using inflation values that many customers did not understand and that could not be known at the time of signing up. As a result, customers may experience unpredictable price rises, which can be significant at times of high inflation.

Under the new rules, providers are still able to raise prices during the contract period, but at the point of sale they must give customers clarity and certainty about the price they will pay. If providers modify the customer's contract to increase the price by more than the customer agreed when the customer signed up, they must give them the right to exit the contract without penalty.

Our rules for how providers should set out any in-contract price rises apply to contracts that customers have entered since January 2025. The change in the rules means that most providers currently have a mix of customers on older contracts with inflation-linked price rise terms, and newer customers – or those who have re-contracted – whose contracts include price increases set out in pounds and pence. Customers with pre-existing contracts that contain inflation-linked price rise terms will continue to see inflation-linked annual price rises, unless notified otherwise.[14]

[14] BT recently contacted out-of-contract customers on older contracts with inflation-linked price increases to inform them that they would be subject to increases, stated in pounds and pence, from 1 March 2026. As this represents a change in their contract terms, these customers will also be able to exit their contract without penalty (which they can do anyway, as they are out of contract).

Figure 12: Timeline for introduction of the new in-contract price increase rules



Source: Ofcom
Note: In addition to those which set out mid-contract price increases as inflation-linked formulas or in pounds and pence, some contracts allow for in-contract price rises but do not state what they will be – where this is the case, customers have the right to exit their contract without penalty if the price of their service/s increases.

How providers have implemented the new rules

Most of the largest UK providers have in-contract price rises as standard in their customer contracts, and these price rises are usually applied in March or April each year; however, some providers (such as Brsk, Utility Warehouse and Zen) either do not set out any specific price rises in their contracts, and give customers a right to exit penalty free when they increase the price, or have a fixed price for the duration of the contract.

Sky does not typically set out specific price rises in its contracts, and when its prices increase affected customers are free to leave without penalty. On 4 February 2026, Sky announced increases in monthly prices for broadband (£3) and TV (from £1-£3 for its base TV packs, plus an additional £1-£3 for its premium TV packs). These price increases will apply from 1 April 2026, and existing customers affected by them were given the right to exit penalty free. For customers signing up to a new Sky broadband and/or TV package from 4 February onwards, Sky's website sets out the relevant price increase and these customers will not have the right to exit penalty free in April.[15]

Not all new customers joining after 4 February will receive a price increase in April as certain products are not in scope, and some customers will have pricing protection during the first 60 days of their minimum contractual term. This follows Sky's January 2026 announcement that most of its mobile customers, including in-contract customers for the first time,[16] would face a £1.50 monthly increase from 14 February 2026.

According to Pure Pricing's monthly broadband and mobile tracker reports, customers signing up to new broadband contracts with the largest UK residential providers in December 2025 are subject to an annual price increase of £2 to £4 per month from March/April 2026, while people entering into a

[15] Not all new customers signing up to Sky after 4 February will receive a price increase in April as certain products are not in scope.
[16] Sky Mobile did not increase the price for customers during the minimum contract period prior to this announcement. Affected customers had a 30-day right to exit their contract penalty free.

new mobile phone contract will be subject to an annual increase of between £1.80 and £2.50 per month also to be applied in March/April 2026.

The table below gives a summary of the pounds and pence monthly price increases applied by the major fixed and mobile providers to the accounts of their residential customers with newer contracts in 2025, along with the price rises customers who entered new contracts in December 2025 can expect to pay in 2026.

Customers on older contracts may be subject to mid-contract price rises calculated using inflation-linked formulas in March/April 2026. For many this will be 7.3% (CPI published in January 2026 +3.9%) while others, such as those with Virgin Media and/or O2, will face increases of 7.7% (RPI published in February 2026 +3.9%). These customers would not know how much more they will pay in 2026 until; (i) CPI/RPI figures are published (which can be many months after they took up their contract) and they then calculate the increase/s themselves; or (ii) the increase is communicated to them by their provider.

Providers that have signed the Government's Telecoms Consumer Charter[17] have agreed that April 2026 will be the final time they will apply inflation-linked price increases (after which all contracts will set out clearer pounds and pence in-contract price rises)[18] and where a contract includes a mid-contract price increase, they will not change this unless there are unforeseeable and externally driven events that materially affect the cost of providing services (in which case, affected customers will be able to leave without penalty).

Figure 13: In-contract monthly price rise terms for selected providers

Provider	Service/s	Inflation-linked annual price rise formula pre Jan 2025 rule changes[1]	2026 annual price increase for customers subject to inflation-linked price rises[2]	2025 £/p price increase[3]	2026 £/p price increase[4]
BT, EE	Broadband, fixed voice, mobile, TV	CPI published in Jan + 3.9%	n/a	£3 (broadband) £1.50 (mobile) £2 (TV)	£4 (broadband) £2.50 (mobile) £2 (TV)
iD Mobile	Mobile	CPI published in Feb + 3.9%	6.9%	n/a	£1.50 (handset plans only) No increase for SIM-only customers
KCOM[19]	Broadband and fixed voice	CPI published in Jan + 3.9%	£1-£3 (broadband)	£1-£3 (broadband)	£1-£3 (broadband)
Lebara	Mobile	Lebara offers SIM-only plans without in-contract price rises			

[17] BT, Virgin Media O2, VodafoneThree, Sky and TalkTalk are examples of providers who have signed the Telecoms Consumer Charter, as reported in https://www.gov.uk/government/news/end-to-surprise-phone-and-broadband-bill-hikes-to-help-with-cost-of-living.
[18] Statement: Prohibiting inflation-linked price rises, 19 July 2024.
[19] The 2025 and 2026 £/p annual price increase is dependent on the broadband package taken. Since the new rules came into effect, KCOM customers whose contracts include inflation-linked in-contract price rise terms have been subject to the same £/p price increases as customers with a newer contract who take the same package. In all cases, this has resulted in a lower annual price increase than under the inflation-linked formula set out in their contract.

Provider	Service/s	Inflation-linked annual price rise formula pre Jan 2025 rule changes[1]	2026 annual price increase for customers subject to inflation-linked price rises[2]	2025 £/p price increase[3]	2026 £/p price increase[4]
O2	Mobile (airtime only)	RPI published in Feb + 3.9%	7.7%	£1.80 (O2 mobile)	£2.50 (O2 mobile)[20]
Plusnet	Broadband, fixed voice	CPI published in Jan + 3.9%	7.3%	£3 (broadband)	£4 (broadband)
Sky	Broadband, TV, mobile	Sky includes 'prices may vary' terms in its contracts.[21] This enables providers to implement price rises for which the value and frequency are not specified in a customer's contract, but providers are required to give customers at least one month's notice of the price increase and the right to exit their contract without penalty. In 2025, the average increase was 6.2% for broadband and TV services, with Sky Mobile out-of-contract customers seeing a £1.50 monthly rise, and Sky has announced further increases for 2026.			
TalkTalk	Broadband, fixed voice	CPI published in Jan + 3.7%	7.1%	£3 (broadband)	£4 (broadband)
Tesco Mobile[22]	Mobile	CPI published in Jan + 3.9% (no increase for Clubcard holders)	7.3%	£/p price rise dependent on monthly price of the contract (no increase for Clubcard Price tariffs within the minimum commitment period)	£/p price rise dependent on monthly price of the contract (no increase for Clubcard Price tariffs within the minimum commitment period)
Three	Mobile	CPI published in Jan + 3.9%	7.3%	£1-£1.50, (mobile) £2 home (broadband)	£1.80-£2.30 (mobile) [23]
Virgin Media	Broadband, fixed voice, TV	RPI published in Feb + 3.9%	7.7%	£3.50 (main service)	£4
Vodafone [24]	Broadband, Mobile	CPI published in Jan + 3.9%	7.3%	£1-1.80 (mobile) £3 (broadband)	£1.50-2.50 (mobile) £3.50 (broadband)

Source: Ofcom / provider websites / media reports and Pure Pricing Broadband and Mobile Pricing Tracker reports, data as at December 2025.

[20] In October 2025, O2 mobile customers were notified that it was modifying their contracts to change the level of the annual price rise they would pay from April 2026 to £2.50 a month, a level higher than the £1.80 price annual price increase to which these customers had agreed on signing up to their contract. In these cases, customers had the right to exit their contract without penalty and shop around for a new contract with a different provider.

[21] Sky Mobile introduced 'prices may vary' terms for new customers or re-contracting customers in November 2025; before this Sky Mobile did not increase the price for customers during the minimum contract period.

[22] The pounds and pence price rise applied to new contracts is equivalent to 6% of the monthly price. So for example, a new customer paying £15 a month would pay £15.90 from 1 April 2026.

[23] The annual price increase is dependent on the data allowance of the tariff.

[24] The annual price increase for mobile is dependent on the type of tariff taken.

Notes: [1] These are the inflation-linked price rise formulas that were included in customer contracts prior to providers updating their tariffs to comply with the new rules banning inflation-linked price rises which came into effect on 17 January 2025; [2] these are the percentage price rises that may be applied to the accounts of customers with older contracts that include inflation-linked price increase terms in March/April 2026; [3] these are the March/April 2025 price rises that were applied to the accounts of customers whose contracts complied with the new rules came into force on 17 January 2025 and included annual price rises set out in pounds and pence (some customers with contracts running into 2026 will face the same increases in March/April 2026); [4] these are the March/April 2026 price rises that will be applied to the accounts of customers who signed up to services in December 2025; there are some exclusions by specific providers in terms of services and customers.

In-contract price increases do not necessarily mean that overall prices are increasing

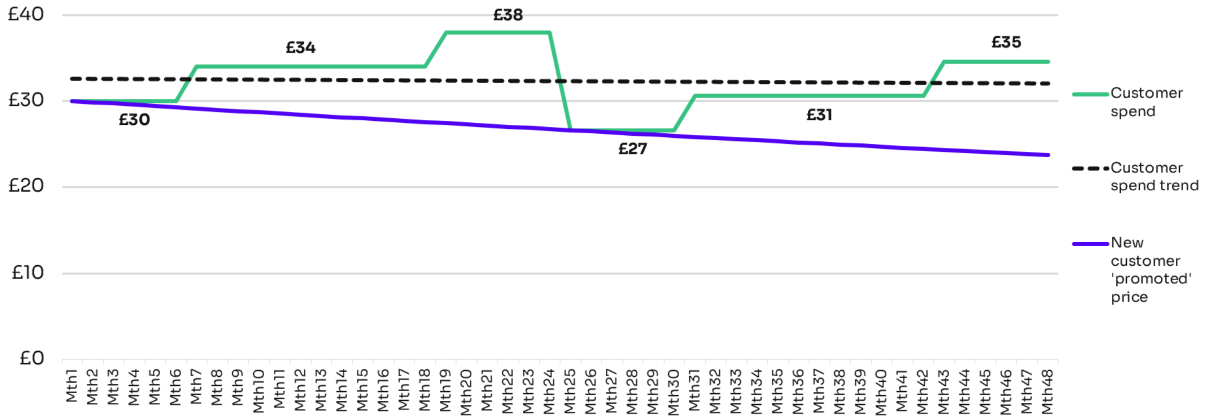
Annual in-contract price rises do not necessarily mean overall prices are increasing, as they can be offset by falling initial new customer “promoted” prices (which account for a much larger share of the total cost of most services and have consistently fallen in real terms in recent years). In a market where customers have a wide choice of services, engage with the market, and have the information needed to compare what they will pay over the course of a contract, competition will limit the scale of any price increases.

We have used a hypothetical example to illustrate this point, in which a customer signs up for a fixed broadband service with a new customer “promoted” price of £30 per month. After six months the price they pay increases by £4 per month to £34, and 12 months later there is a further £4 per month increase to £38, which is what the customer is paying for their service at the end of their two-year minimum contractual period. However, if the new customer “promoted” price of services like the one the customer takes is falling (as shown by the blue line in the chart), when their contract ends, they can switch or recontract at a new, lower, promoted monthly price.

In our example, after two years, this is around £27, £11 a month less than they were paying previously and £3 per month less than they initially paid when they signed up for their last service. This cycle then continues for a further two-year contract. The dotted trend line shows that, while the customer may have been subject to annual price increases, the overall trend in the nominal price they pay is flat, as price increases have been offset by the falling promoted price. Furthermore, once inflation is taken into account, the trend in the price paid by the customer will be downwards, despite annual price increases having been applied to their account.

It is important to note that, had the customer not engaged with the market and re-contracted/ switched to a different service at the new, lower, promoted price at the end of their initial minimum contractual period, the trend in the price they paid would have been upwards. This highlights the importance of customers taking action when they reach the end of their contract.

Figure 14: Hypothetical example of how communications services prices can trend downwards despite annual price increases



Source: Ofcom

An initial assessment of the impact of the rule changes

Customers now have improved clarity about what they will pay for a service before they sign up

The objective of our new rules is to give customers clarity and certainty about what they will pay for their service, before they sign up to a contract.

Ofcom research conducted before the new rules were introduced found that most customers did not understand the inflation-linked price rises that many providers had introduced: 55% of broadband customers and 58% of pay monthly mobile customers did not know what inflation rates such as CPI and RPI measure; and of those who were with providers that use inflation-linked price rises, very few fixed broadband (16%) or mobile customers (12%) were both aware of the price rise and able to identify that it was inflation-linked with an additional percentage.

We also found that, even when people did consider future inflation-linked price rises when choosing a contract, they often did not understand them fully and found it difficult to estimate what the impact could be on their payments.

Under the new rules, customers entering new contracts with annual price increases will have these increases specified upfront, at a predetermined amount expressed in pounds and pence. Some customers on legacy contracts will be subject to in-contract price rises linked to the rate of inflation plus a further percentage, however, providers that have signed the Government's Telecoms Consumer Charter[25] have agreed that April 2026 will be the final time they will apply inflation-linked increases and all customers will be moved onto contracts which specify in-contract price rises in pounds-and-pence.

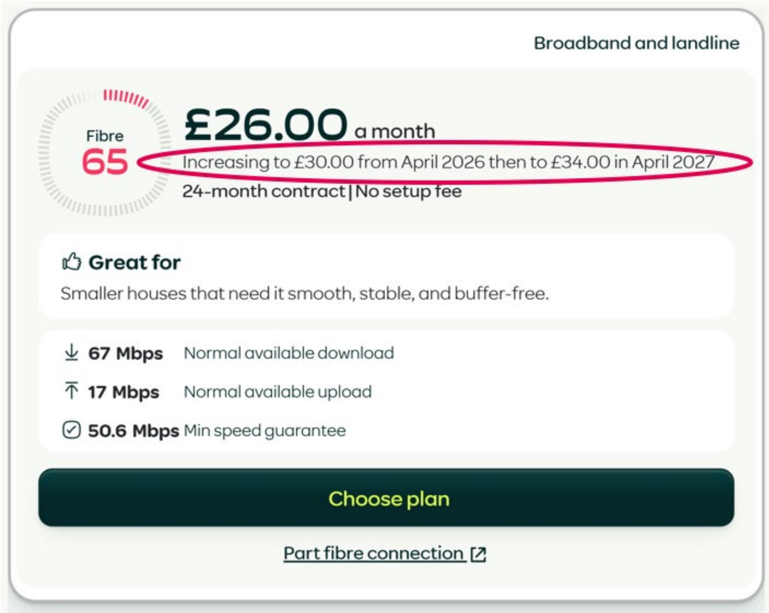
The new rules help to deliver certainty for customers about how much they are contractually bound to pay, and improve the transparency and prominence of point-of-sale information about in-contract price rises.

Before signing up to a contract, customers now receive clear information about the initial price of a service, as well as any price rises that will take place and when these will be. If providers change these terms, customers have the right to exit their contract without penalty and can shop around for a new contract with a different provider.

We have also seen more digital comparison tools make clear in their recommendations to users how in-contract price rises will change the price they will pay for different deals (which was not possible when tariffs were subject to inflation-linked price rises of an unknown value). This has further improved clarity and certainty for customers, as was the objective of the new rules.

[25] BT, Virgin Media O2, VodafoneThree, Sky and TalkTalk are examples of providers who have signed the Telecoms Consumer Charter, as reported in https://www.gov.uk/government/news/end-to-surprise-phone-and-broadband-bill-hikes-to-help-with-cost-of-living.

Figure 15: Example of changes to how prices are presented under the pounds and pence mid-contract price rise requirement



Source: Operator website

Most providers have introduced flat-rate in-contract price rises

Retail telecoms markets are competitive, and we do not regulate retail prices: the level of retail prices is for providers to determine, considering market conditions, their business needs, and costs. In our work to introduce the new rules, we recognised that the move to pounds and pence in-contract price rises could have an impact on price levels but the direction of this potential impact was unknown.

When in-contract price rises are linked to inflation, the amount of the price increase depends on the value of CPI inflation at a point in time and, for individual customers, the current price of their service.

Under the new rules, where in-contract price rises must be set out in pounds and pence, most providers have adopted a flat increase, regardless of the package a customer takes. This is a commercial decision in a competitive market where retail prices are not regulated. As a result of this approach, customers on cheaper packages are likely to have proportionally higher annual price rises than those on more expensive packages, as illustrated below.

As lower-income customers may be more likely to take cheaper packages, the providers' approach could result in these customers experiencing higher than average percentage annual price increases.

Figure 16: Illustration of how the new rules impact customers depending on the service price

Customer	Initial monthly price	Inflation-linked price rise (CPI Jan 2025 + 3.9% = 6.4%)	March 2025 £/p price rise	Comparison
Customer A **(basic standalone part-fibre broadband)**	£24.99	£1.60	£3	£/p price rise is higher
Customer B **(premium standalone ultrafast full fibre broadband)**	£67.99	£4.35	£3	£/p price rise is lower

Source: Ofcom

It is too early to see all the impacts of the new rules

The updated in-contract price rise rules took effect on 17 January 2025 for all customers signing up to new contracts. The new rules were introduced to increase consumers' understanding of, and certainty about, the prices they will pay over the lifetime of a contract. It was also anticipated that this improved understanding would benefit competition, as consumers would be better placed to compare different services and choose between them. In addition, the new rules were designed to protect customers from unfair burdens and risks. Our reforms have meant that customers have the information that they need to make informed decisions.

Customers who signed up to new contracts before 17 January 2025 may continue to be subject to inflation-linked price rises.[26] As annual price rises are typically applied in March/April every year, relatively few customers were subject to the first annual pounds and pence price increases when they were implemented in March/April 2025. In March/April 2026, some will still be subject to inflation-linked increases, but many customers will be subject to pounds and pence price increases as they will have signed up to a contract after the new rules came into force; in March/April 2027, no in-contract customers will be subject to inflation-linked price rises (See Figure 12 above).

As is shown in Figure 13 above, in-contract price rises announced for 2026 range from between £1.80 and £2.50 for mobile and between £2 and £4 for broadband. Customers who are on inflation-linked in-contract price rises will have price rises of between 6.9% and 7.7%. This indicates that for many customers the pounds and pence price in-contract price rises will be higher than the equivalent inflation-linked increases in 2026.[27] As the pounds and pence price increases are flat-rate, they are higher as a percentage of total price for customers on lower-priced tariffs and lower for those on higher-priced tariffs.

[26] BT began including fixed pounds and pence annual price rise terms in new contracts from Q2 2024, but most providers did not adopt this approach until Q4 2024. A small number of providers were still selling contracts with inflation-linked price rises in early 2025, weeks before the new rules were introduced. On 12 February 2026, major providers signed the Government's Telecoms Consumer Charter, in which they committed that April 2026 would be the final inflation-linked price increase for customers on legacy terms, after which they will adopt clearer pounds-and-pence in-contract price increases.

[27] Based on data collected from operators: average in-bundle spend in Q2 2025 on pay-monthly SIM-only mobile was £14.59 a month, so an 8% increase would be £1.17 a month; average in-bundle spend on standalone fixed broadband was £31.05 a month, so an 8% increase would be £2.48 a month; and average in-bundle spend on dual-play (fixed voice and broadband) bundles was £39.20 a month, so an 8% increase would be £3.14 a month.

In-contract price rises, however, only give a partial view of changes in pricing. A full analysis needs to compare the total price of the contract and look at customer spend over the length of a (typically two-year) contract. It is possible that increases in in-contract prices rises are offset by decreases in the initial “promoted” price of contracts. As many customers are still subject to inflation-linked price increases, we do not currently have sufficient evidence to draw any firm conclusions on how the new rules have impacted overall prices, or levels of consumer engagement.

It is also the case that there are other market dynamics that may be impacting pricing and switching, including, in fixed markets, the shifts towards full-fibre and standalone broadband, and in mobile markets the increasing take-up of SIM-only contracts, steep increases in data consumption over 5G networks, and the recent merger of Vodafone and Three.

Overall, we are confident that the market is delivering good outcomes for consumers. The evidence presented in relation to pricing across this report generally shows that real-term prices have been falling, and that consumers have been getting more of a service for any given amount they pay. For example, we observe a steep decline in mobile spend per GB purchased/consumed, showing consumers getting more for less, while analysis of fixed broadband pricing data for new customers shows that they can often upgrade to a faster, more reliable full-fibre service and pay the same, or sometimes less, than they currently do.

We will publish a fuller review of the impact of the new price rise rules in 2027

In January 2027, it will have been two years since providers have offered contracts with inflation-linked price increase terms, meaning that all such contracts will have reached the end of their minimum contractual period and people on these contracts will be free to move to a new service without penalty.

While it is currently too early to draw any firm conclusions on the effects of the new price rise rules, we will publish a full review of their impact in 2027.

Pricing of fixed broadband and bundled services

Standalone fixed broadband pricing

Taking standalone fixed broadband results in savings for households that do not need a fixed voice service

UK fixed voice use is continuing to decline as people increasingly rely on their mobile phones and online communications services such as WhatsApp, Facebook Messenger, and Apple FaceTime to stay in touch. Fixed broadband services were traditionally bundled with fixed voice subscriptions, even when customers had no need for a phone line. Data collected from the UK's major residential telecoms providers for use in this report shows that 70% of households which purchased fixed voice and broadband services together (with or without additional services) did not make an outgoing call in Q2 2025.

Five years ago, nearly all broadband tariffs included a voice line. However, standalone broadband services now have widespread availability across the UK, driven by the introduction of wholesale standalone broadband products from Openreach, alongside offerings from alternative full fibre providers and Virgin Media. They have proved to be popular; data collected as part of Ofcom's programme of regular data collection from telecoms operators show that there were 7.4 million residential standalone fixed broadband lines at the end of June 2025 (equivalent to about 28% of all residential broadband lines), up from 6.1 million the previous year.

To understand the savings available to households that do not need a fixed voice service, we have compared the promoted prices for standalone fixed broadband and dual-play fixed broadband and fixed voice bundles which have similar broadband connections (in terms of advertised speed and technology) for the providers included in Pure Pricing's UK Monthly Broadband Pricing Tracker that offer both. This analysis suggests that taking a standalone broadband service without a fixed voice service can give significant savings: in September 2025 the monthly promoted price for standalone fixed broadband service was on average £7.00 (18%) cheaper than the average promoted price for fixed broadband bundled with a fixed voice service.

The savings were much higher for some Virgin Media tariffs: up to £23 per month for those taking its 1130 Mbit/s standalone package. The larger differences between the promoted prices of some Virgin Media standalone fixed broadband services and the equivalent fixed broadband and fixed voice bundles were due to it offering more generous discounts on its higher-tiered standalone services broadband services to encourage their take-up. The difference between the standalone broadband and dual-play bundle list prices was the same across all Virgin Media broadband tiers, at £8 per month.

Figure 17: Differences between selected residential standalone fixed broadband and dual-play fixed broadband and fixed voice bundle promoted prices, for providers offering both: September 2025

	Monthly promoted price saving when buying standalone broadband compared to a dual-play (fixed broadband and fixed voice) bundle (£/month)
BT	£5
Community Fibre	£10
EE	£5
TalkTalk	£2 (77 Mbit/s and 152 Mbit/s); £3.05 (525 Mbit/s) £4: (944 Mbit/s)
Virgin Media	£7 (132 Mbit/s); £16 (362 Mbit/s); £18 (516 Mbit/s); £23 (1130 Mbit/s)
Hyperoptic	£4
Zen	£7.50

Source: Ofcom / Pure Pricing's UK Monthly Broadband Pricing Tracker September 2025.
Notes: Figures are calculated using the average monthly price for each service, thereby accounting for any promoted discounts; negative figures indicate a saving when purchasing fixed broadband on a standalone basis; Sky is not included in the table above as it had no standalone fixed broadband offerings in September 2023; TalkTalk is not included in the table above as there were no dual-play bundles offered by TalkTalk which had an equivalent fixed broadband service to its standalone fixed broadband products.

Standalone broadband prices are falling for all connection types

Many providers offer lower prices to new or re-contracting customers. These promoted prices typically last for the service's minimum contractual period (MCP) and are lower than the standard list price. However, once the minimum contractual period ends and the customer takes no action, the customer becomes out-of-contract and reverts to paying the list price.

We have also used data from Pure Pricing's Monthly Broadband Pricing Tracker reports to look at the price of standalone fixed broadband services, by the three main technologies used to provide broadband connectivity: full-fibre FTTP, and part-fibre FTTC and cable. The analysis of standalone full-fibre prices presented below differs from that shown in previous reports, as it includes Virgin Media's tariffs (which are provided over both cable and full-fibre infrastructure and were previously excluded from the full-fibre figures).

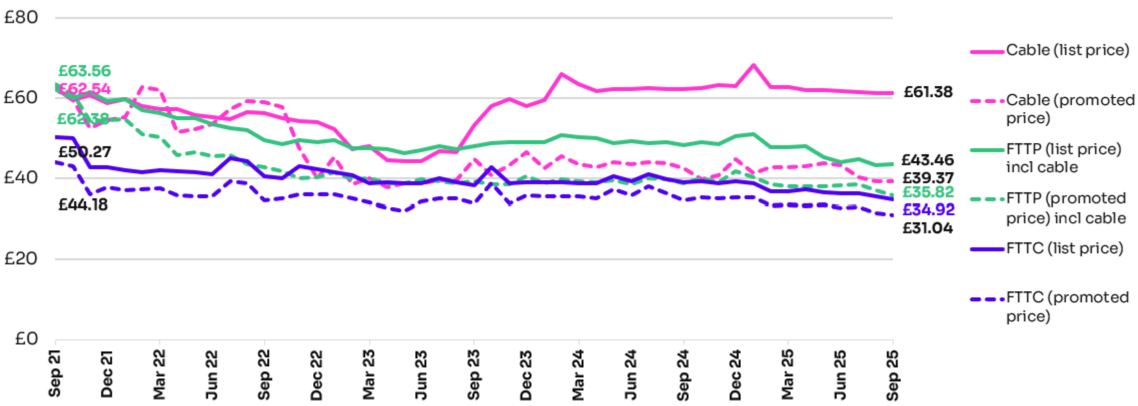
Standalone fixed broadband prices fell in real terms for all technologies in the year to September 2025. The average list and promoted prices of standalone fibre-to-the-cabinet (FTTC) broadband services fell by 11% and 10% respectively in real terms in the year to September 2025, while there were similar falls in average list and promoted prices of standalone full-fibre services during this period (down by 10% and 8%). For standalone cable services, the average decline in the promoted price (down 8% year on year in real terms) was much higher than the decline in list prices, which fell by 1%. The list and promoted prices for all technologies also fell in nominal terms year on year, except for the list price of standalone cable services, which increased by 2%.

In the three years to September 2025, the average list and promoted standalone broadband prices also fell in real terms for the three technologies except cable, for which there was a 9% increase in list prices. During this period, average list and promoted prices for standalone full-fibre services fell by 13% and 16% respectively, as providers reduced prices to encourage take-up of these services, and average cable promoted prices fell by 33%, likely in response to increased competition from ultrafast full-fibre services.

The analysis shows deep discounting of standalone cable broadband services, which had the highest average list price among the three technologies covered in the year to September 2025. The average promoted discount (the difference between list and promoted prices) for standalone cable broadband services was 36% in Q2 2025, double the 18% average for standalone full-fibre services and more than three times the 11% for superfast FTTC services.

A comparison of full fibre and cable prices (which is more meaningful than a comparison with FTTC, which cannot offer ultrafast broadband products with an advertised speed ≥300 Mbit/s), shows that the main driver of the larger average price differential for cable compared to full fibre was cable's higher list prices. Whereas the average monthly promoted price of standalone cable services in September 2025 was 10% higher than the average for similar full-fibre services, cable's average list price was 41% higher than the full-fibre average.

Figure 18: Average monthly real-terms prices for standalone fixed broadband services, by technology: September 2021 to September 2025



Source: Ofcom / Pure Pricing's Monthly Broadband Pricing Tracker reports.
Notes: Values are the mean average prices of tariffs included in the dataset and are unweighted; Virgin Media offers services over both cable and full fibre and its tariffs are included in both; Sky does not specify a technology for some of its services and will provide connectivity using either FTTC or full fibre, according to availability (at the same price); in this analysis, Sky services that can be provided over FTTC (including G.fast) and full fibre are included in both technologies; based on the price a new customer pays when they sign up and excludes the impact of any annual price rises; excludes services with a one-month minimum contractual period; adjusted for CPI (September 2025 prices).

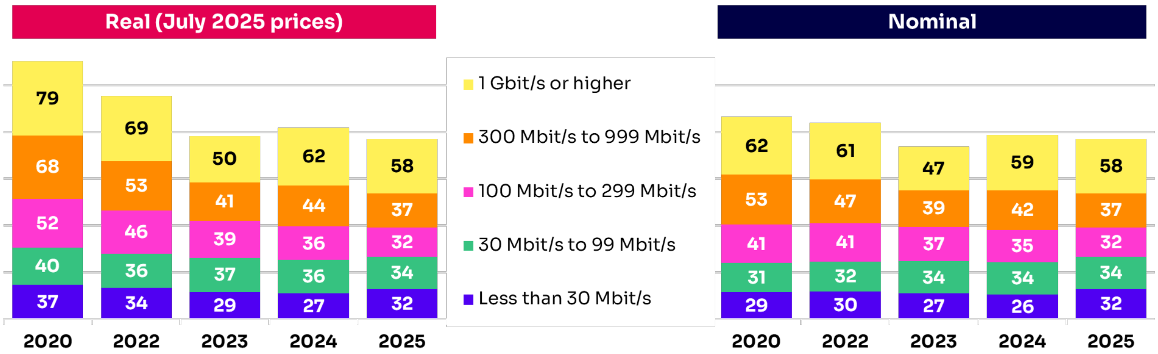
Standalone broadband prices have fallen for higher-speed services

We have also used OECD's pricing model to analyse trends in the prices of standalone broadband services. This analysis is based on identifying the lowest prices available from each of the UK's major broadband providers and then weighting the result by market share to get an average price. We did this for five different broadband speeds, ranging from under 30 Mbit/s to 1 Gbit/s or higher.

On average, we found that there was a 6% decrease in price in real terms (2% nominal) across these five connections in the year to July 2025, when prices fell in both real and nominal terms for the four highest-speed connections. Average prices fell most, both in actual price and percentage terms, for the 300 Mbit/s to 999 Mbit/s connection, down by £7.16 per month and 16% in real terms compared to July 2024. This was followed by prices for the 100 Mbit/s to 299 Mbit/s connection, which fell by 12% in real terms (9% nominal).

The lowest speed connection (of less than 30 Mbit/s) was the only one for which the price increased year on year; up by 17% in real terms (22% nominal) compared to July 2024. Despite being the slowest connection in our analysis, it was not the cheapest: the 100 Mbit/s to 299 Mbit/s connection had a slightly lower average monthly price, by less than a pound (45 pence). Over the five-year period since 2020, the price of all five different connections fell in real terms, and the prices of the fastest three connections have fallen in nominal terms. This indicates that providers are incentivising upgrades to faster full-fibre services, including those provided over full fibre.

Figure 19: Weighted average monthly prices of standalone fixed broadband services (£/month, excluding set-up cost): 2020 to 2025



Source: Ofcom / OECD.
Notes: All figures are rounded to the nearest number; based on standalone fixed broadband prices from the UK's largest providers: BT, EE, Plusnet, TalkTalk, Sky, Now, Utility Warehouse, Virgin Media, and Vodafone; analysis is based on tariffs available to a new customer who signs up and excludes the impact of any annual price rises; real-terms figures are adjusted for CPI (July 2025 prices).

Broadband pricing from smaller providers

Altnets offer increased choice in some areas and are often cheaper

Ofcom's Connected Nations 2025 report shows that by July 2025, full-fibre broadband was available to 78% of UK homes, and 87% were passed by a gigabit-capable cable and/or full-fibre network.

The recent deployment of full-fibre networks by Openreach, Virgin Media O2 and a wide range of new challenger companies (often referred to as altnets)[28] has led to a significant increase in the choice of services and networks: more consumers can choose to take faster, more reliable broadband services, and take it from retail providers using different networks.

As a market entry strategy, altnets that offer retail services often offer lower retail prices than those available from established broadband providers, to attract customers.

There is evidence that the larger established providers have been dropping their prices. The chart below shows examples of prices for full-fibre broadband services, both from altnets and the UK's larger providers. When compared with a similar table in last year's report, ultrafast broadband package pricing by the big providers has declined, in terms of promoted pricing if not always for their list prices.

[28] Altnet is short for an alternative network provider and refers to a provider other than Openreach or Virgin Media O2. An altnet is an organisation operating within the UK that has its own network infrastructure which it uses to provide wholesale and/or retail broadband services.

In addition to the monthly price, some providers charge installation/set-up/activation fees which can vary considerably by provider. However, many have removed these charges to further incentivise prospective customers to sign up to services. Some providers also offer 'contract buyout' options for customers who are in-contract with another provider, whereby they apply a bill credit of up to £300 to those who join them after having paid an exit penalty for leaving their previous contract early.

Figure 20: Selected full-fibre broadband service pricing: August/September 2025

	100/ 150 Mbit/s	300/350 Mbit/s	500/600 Mbit/s	900-1,000 Mbit/s	>1 Gbit/s	Set-up fees	Contract (months)
	(Promoted price[29]) list price						
B4RN	-	-	-	£33.00	£150.00	£60.00 over a year	12
Brsk	£24.00	-	£30.00	£35.00	£55.00	Free	18
BT[30]	(£28.99) £73.99	(£32.99) £77.99	(£32.99) £79.99	(£37.99) £87.99	£60.99[31]	Free	24
Community Fibre	£19.00	£21.00	£23.00	£25.00	£39.00	Free	24
County Broadband	(£35.99) £42.99	(£39.99) £50.99	(£48.99) £68.99	(£54.99) £84.99	-	Free	24
Cuckoo	£30.00-£43.00	-	£35.00 - £48.00	£38.00-£54.00	-	Free	24
G.Network	-	(£24.00) £46.00	-	(£28.00) £49.00	-	£29.00 for 300Mbit/s; £15 for 1Gbit/s	24
Gigaclear	(£17.00) £43.50	(£20.00) £54.00	(£26.00) £57.00	(£49.00) £85.00	-	Free	18
Hyperoptic	£19.00 - £25.00	-	£23.00 - £29.00	£25.00 - £31.00	-	£19.00	24
Jurassic Fibre	£32.00	-	£35.00	£40.00	-	Free	24
KCOM	(£28.99) £46.99	£55.99	(£34.99) £62.99	(38.99) £72.99	-	£24.99	24
Lightning Fibre	£22.00	£28.00	(£25.00) £32.00	£36.00	£44.00	Free	24
Sky	(£22.00) £43.00	(£25.00) £43.50	(£26.00) £46.00	(£35.00) £49.00	-	Free	
TalkTalk	£26.00	-	£35.00	£38.00	-	Free	24

[29] All promoted prices are for new customers only.
[30] BT list prices refer to the maximum in-contract price charged according to its consumer price guide.
[31] Deal offered through EE but powered by BT and advertised on their website.

	100/ 150 Mbit/s	300/350 Mbit/s	500/600 Mbit/s	900-1,000 Mbit/s	>1 Gbit/s	Set-up fees	Contract (months)
toob	(£18.00) £22.00	-	-	£25.00	-	Free	18
Trooli	(£24.99) £29.99	-	(£29.99) £34.99	(£34.99) £39.99	(£39.99) £49.99	Free	24
Truespeed	(£25.00) £45.00	(£29.00) £55.00	(£32.00) £65.00	(£39.99) £75.00	-	Free	12
Virgin Media	(£23.99) £54.00	(£26.99) £66.00	(£31.99) £72.00	(£36.99) £78.00	-	Free	24
Vodafone	£25.50	-	£31.00	£36.00	£50.00	Free	24
WightFibre	(£20.95) £30.95	(£21.95) £31.95	(£25.95) £35.95	(£31.95) £41.95	-	Free	1
Zzoomm	-	-	(£25.00) £37.00	(£29.00) £48.00	(£49.00) £70.00	Free	12

Source: Ofcom / Pure Pricing's UK Monthly Broadband Pricing Tracker September 2025 / provider websites.
Notes: Prices as of August/September 2025 and include VAT; providers offer one of these broadband speeds; Virgin Media also uses DOCSIS-based infrastructure; KCOM, Vodafone and WightFibre's tariffs include a fixed voice service; other contract lengths may also be offered.

The savings available by re-contracting vary by bundle type

Despite the significant spend differentials between in-contract and out-of-contract customers, a notable proportion of customers do not re-contract or switch supplier at the end of their minimum contractual period. Data from the UK's largest operators shows that 28% of customers with a fixed broadband service were out-of-contract for at least one service in their bundle at the end of June 2025, unchanged year on year.

Comparison of the spend differential between in-contract and out-of-contract customers allows us to determine the potential saving to be gained by re-contracting. For two bundle types (fixed broadband and mobile phone bundles, and fixed broadband, fixed voice and mobile phone bundles) out-of-contract customers' average spend was lower than that of in-contract customers in Q2 2025. This is likely to be because these bundles both include mobile phone services, and in-contract mobile customers are more likely to be paying for a handset than out-of-contract customers.

Among the other services/service combinations, the spend differential declined year on year, and in Q2 2025 out-of-contract customers' average spend was between 11% and 25% more than that of in-contract customers, depending on the bundle taken. This highlights that customers can usually save money by acting when their current contract ends, and either switching provider or re-contracting with their existing one.

Figure 21: Difference in average customer spend (out-of-contract minus in-contract spend) for standalone and bundled fixed broadband customers, by type of service (% of in-contract spend, £/month): Q1 2024 and Q1 2025

	Average additional spend among out-of-contract customers		Average out of contract customer additional spend as a % of in-contract spend	
	2024	2025	2024	2025
Standalone fixed broadband	£11.05	£7.20	37%	25%
Fixed voice & fixed broadband	£7.92	£7.84	21%	22%
Fixed broadband & mobile phone	(£7.66)	(£16.24)	(14%)	(27%)
Fixed broadband & pay TV	£15.64	£7.22	32%	14%
Fixed broadband, fixed voice & pay TV	£12.50	£9.28	19%	14%
Fixed broadband, fixed voice & mobile phone	£6.59	(£0.67)	12%	(1%)
Fixed broadband, fixed voice, pay TV & mobile phone	£16.58	£9.26	22%	11%

Source: Ofcom / provider data.
Notes: All figures are rounded to the nearest number; dual-play refers to fixed broadband and fixed voice bundles, triple-play to fixed broadband, fixed voice and pay TV bundles, and quad-play to fixed broadband, fixed voice, pay TV, and mobile phone bundles; year-on-year spend comparisons are presented in real terms (CPI Q2 2025 prices). Provider data was collected from BT (incl. EE and Plusnet), KCOM, Sky, TalkTalk, Three, Virgin Media O2 and Vodafone.

Bundled service prices

Bundled services continue to be cheaper than buying services on a standalone basis for most households

Many UK households choose to purchase multiple communications services in a bundle from the same provider under one contract. According to Ofcom’s Technology Tracker (fieldwork conducted between January and April 2025), 63% of respondents received at least two of their household communications services – i.e. landline (including line rental), fixed broadband, mobile and/or pay TV – from the same provider.

They do this for convenience and because it is typically cheaper than buying the same services separately on different contracts from the same (or different) provider/s on a ‘standalone’ basis. To understand the cost of communications services, we have designed ‘baskets’ of services representing the usage of four ‘typical’ UK households (further detail regarding these baskets can be found in Annex 1):

- ‘Low-use couple with basic needs’: who have a landline, mobile phones for voice calls only, no broadband and free-to-air TV;
- ‘Late adopter couple’: who have a landline, basic broadband, mobile phones with voice and low data use and free-to-air TV;

- ‘Networked family household’ with a landline, superfast broadband, mobile phones with varying data and voice use, basic pay TV and subscription streaming services; and
- ‘Affluent two-person household’ with no landline, ultrafast broadband, mobile phones with high data use and a premium pay TV package.

We analyse the price of these baskets using a model provided by the OECD, which uses the prices offered to new customers by the UK’s largest residential providers (excluding social tariffs) to identify the lowest-priced combination of standalone and/or bundled tariffs that fulfils each household’s usage requirements. These prices are then used to calculate average prices for each basket and service, which are weighted using provider market shares. More details on the methodology can be seen in Annex 1.

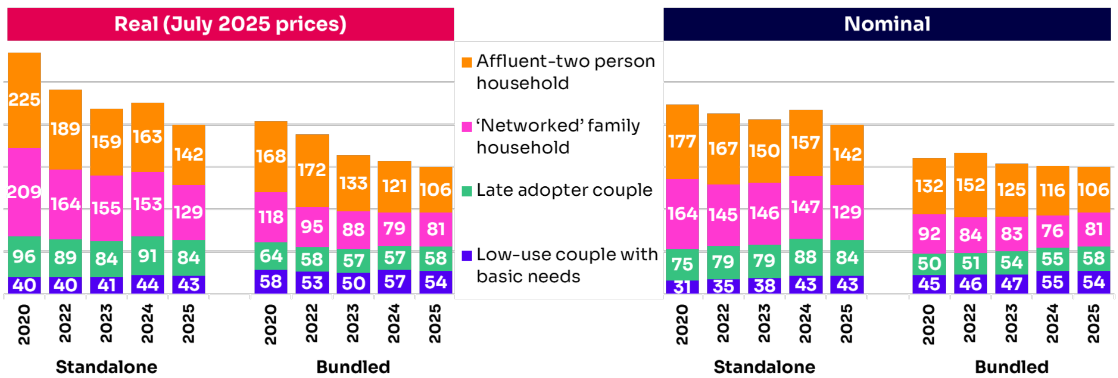
For most households, we found that taking bundled services was cheaper than buying the same services separately on a standalone basis from the same (or different) provider/s, with savings ranging from 25% to 37% (£26 to £48) per month.

The only exception was the basket for the ‘low-use couple with basic needs’ household, which does not need fixed broadband or pay TV services. For this household type, standalone services were 20% (£11 per month) cheaper than buying a bundle. This is because the lowest-priced bundle options for this household include fixed broadband, which it does not require, and means they do not benefit from lower-priced fixed voice services which cannot be used without fixed broadband.

In the year to July 2025, prices for standalone services fell for all four households with an average decrease of 12% in real terms. Proportionally, real-terms prices fell most for the ‘networked family household’, down by 16%, while the ‘low-use couple with basic needs’ saw the smallest drop (2%).

Over the same period, the average bundled price across our four household types fell by an average of 5% in real terms with the ‘affluent two-person household’ seeing the largest real-term price fall of 12%). However, not all households’ prices declined; the ‘late adopter couple’ and ‘networked family household’s prices rose by 1% and 3% respectively in real terms.

Figure 22: Weighted average monthly price for standalone and bundled services, by household basket (£/month): 2020 to 2025



Source: Ofcom / OECD.
Notes: All figures are rounded to the nearest GBP; analysis is based on weighted average tariffs for primary providers at the time a new customer signs up and excludes the impact of any annual price rises; includes promoted discounts; data relates to July in each year except 2020, when it relates to October; households are designed to reflect different usage patterns, each requiring set amounts of fixed voice, mobile phone, fixed broadband and pay TV services; the ‘affluent two-person household’ and ‘networked family household’ require 5G mobile services ; real-terms figures are adjusted for CPI (July 2025 prices).

Dual-play and triple-play bundle pricing

The average prices of all fixed broadband and fixed voice bundle types fell in the year to September 2025

Data collected from the UK's largest telecoms providers for this report shows that 36% of bundles including broadband purchased by households at the end of June 2025 were dual-play (fixed broadband, and fixed voice) bundles, down from 40% in June 2024.

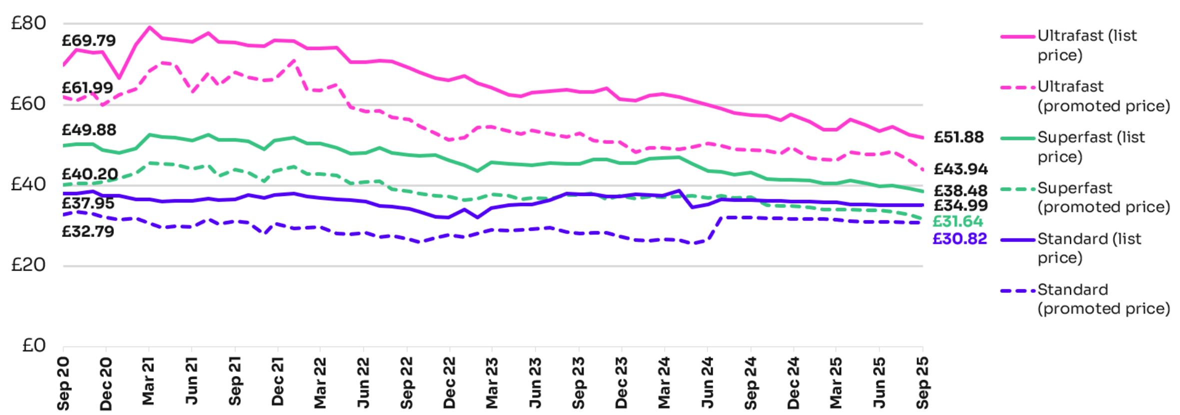
The chart below shows the average of the monthly prices available from the UK's largest broadband providers for dual-play (broadband and voice) services, based on tariffs collected by Pure Pricing. It shows the prices of standard (advertised speed of <30 Mbit/s), superfast (advertised speed of ≥30 Mbit/s and <300 Mbit/s) and ultrafast (advertised speed ≥300 Mbit/s) broadband products and compares 'promoted' prices (i.e. prices available to new customers) and 'list' prices (paid by customers who are out of contract).

The largest year on year falls were in the list and promoted prices for dual-play bundles with superfast broadband, which fell by 11% and 15% respectively in real terms, and 8% and 11% respectively in nominal terms.

The average prices of fixed broadband and fixed voice bundles including ultrafast broadband products also fell, albeit at a slightly slower rate than those of superfast broadband dual-play bundles, in the year to September 2025. The list and promoted prices of these services fell by 9% and 10% respectively in real terms year on year (and were both down by 6% in nominal terms).

Meanwhile, the average list and promoted prices of dual-play services with standard broadband products were unchanged in nominal terms and fell slightly in real terms (both down by just under 4%).

Figure 23: Average monthly real-terms prices for residential dual-play fixed broadband and fixed voice bundles: September 2020 to September 2025



Source: Ofcom / Pure Pricing's Monthly Broadband Pricing Tracker reports.
Notes: Values are the mean average prices of tariffs included in the dataset and are unweighted; there are variations across providers, which are concealed when using average pricing; based on tariffs when a new customer signs up and excludes the impact of any annual price rises; chart shows monthly average of list and promoted available tariffs for new customers from BT, Community Fibre (from February 2022), EE, Hyperoptic (from February 2022), NOW, KCOM, Plusnet (up to April 2024), Post Office (up to March 2021), Shell (up to July 2024), Sky, TalkTalk, Virgin Media, Vodafone and Zen; where available, promotions include the promoted price and any 'gifts' offered; across all call plans, contract terms and data allowances; based on the price a new

customer pays when they sign up and excludes the impact of any annual price rises; standard broadband products are those with an advertised speed <30Mbit/s, superfast ≥30Mbit/s to <300Mbit/s, ultrafast ≥300Mbit/s; adjusted for CPI (September 2025 prices).

Switching and re-contracting continue to provide savings as promoted prices are significantly lower than list prices

The difference between the promoted and list price is known as a 'price differential', which gives an indication of the benefits available to out-of-contract customers who re-engage with the market. As the figures presented here are averages, the actual savings available to an individual customer who switches provider or re-contracts may be higher (or lower).

The table below shows average price differentials for fixed broadband and fixed voice dual-play bundles including standard, superfast and ultrafast broadband products, as calculated from the tariff information in Pure Pricing's UK Monthly Broadband Pricing Tracker reports. The price differential is one way of measuring the potential benefit to a consumer of re-engaging with the market at the end of their MCP. For dual-play bundles, the average price differential increased by 3% in real terms (from £7.15 to £7.38 per month) in the year to September 2025.

Our analysis shows that average list and promoted prices fell in real terms for all three dual-play bundle types we looked at in the year to September 2025. While the list and promoted prices of standard broadband bundles both fell by just under 4% in the year during this period (and were unchanged in nominal terms), the average promoted price for superfast bundles fell at a faster rate than their average list price, as was the case for ultrafast dual-play bundles.

None of these changes resulted in large variations in the size of the price differentials for the different bundles, which ranged from £4.17 per month for standard broadband dual-play bundles (12% of the list price) to £7.94 per month (15% of the list price) for dual-play bundles with an ultrafast broadband product. (The average price differential was £6.84 per month, or 18% of the list price for bundles with a superfast broadband product). Therefore, savings were still available to customers who effectively engaged with the market when their contract was ending.

Figure 24: Average monthly dual-play residential fixed broadband and fixed voice bundle pricing and price differentials, in real terms: September 2025

	Promoted prices		List prices		Price differential	
Broadband	£/month	1-year change	£/month	1-year change	£/month	1-year change
Standard	£30.82	-£1.17 (-4%)	£34.99	-£1.33 (-4%)	£4.17	-£0.16 (-4%)
Superfast	£31.64	-£5.39 (-15%)	£38.48	-£4.74 (-11%)	£6.84	£0.65 (10%)
Ultrafast	£43.94	-£4.78 (-10%)	£51.88	-£5.44 (-9%)	£7.94	-£0.66 (-8%)

Source: Ofcom / Pure Pricing's UK Monthly Broadband Pricing Tracker reports.
Notes: In this analysis, standard broadband products are those with an advertised speed <30Mbit/s, superfast ≥30Mbit/s and <300Mbit/s, and ultrafast ≥300Mbit/s; figures are adjusted for CPI (September 2025 prices).

The cheapest provider's superfast dual-play bundle prices were more than a quarter lower than the average

Price competition between companies benefits consumers and indicates that a market is functioning well. The chart below identifies the lowest-priced providers for dual-play superfast fixed broadband

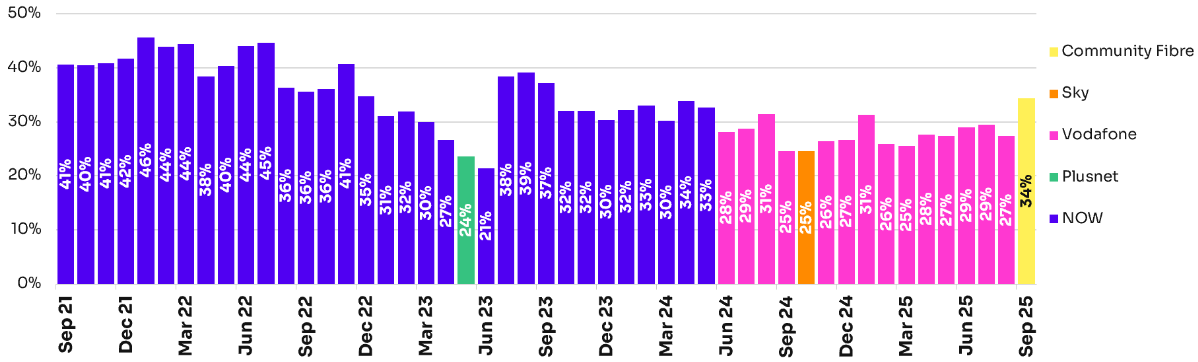
and fixed voice bundles in each month, and the percentage saving between these providers' average prices for these services and the average across all similar tariffs.

To do this, we have calculated an average price across all the superfast dual-play services in Pure Pricing's Monthly Broadband Pricing Tracker reports, and an average price for each individual provider that offers these services. These prices are all monthly averages across the minimum contractual period, and include any promoted discounts.

When looking at our findings, an important consideration is that the mix of broadband services that each provider offers as part of a superfast dual-play bundle will impact the average price (i.e. those with a larger proportion of bundles with higher-bandwidth broadband connections are likely to have a higher average price). Similarly, Pure Pricing's data does not include some smaller providers, which may offer lower prices than those included in our analysis.

As shown below, Vodafone offered the lowest average superfast fixed broadband and fixed voice dual-play bundle prices in ten of the 12 months to September 2025, with Sky being the lowest-priced provider of these services in October 2024 and Community Fibre lowest in September 2025. In Q3 2025, the cheapest provider's prices were, on average, 30% lower than the average across all providers, a slightly larger saving than the 28% average in Q3 2024.

Figure 25: Lowest-priced dual-play superfast fixed broadband bundle provider: September 2021 to September 2025 (bar heights show the percentage saving when comparing the lowest-priced provider and the average price)



Source: Ofcom / Pure Pricing's Monthly Broadband Pricing Tracker reports.
Notes: All figures are rounded to the nearest percentage; Pure Pricing's Monthly Broadband Pricing Tracker reports during the analysed period includes the dual-play fixed broadband and fixed voice tariffs offered by BT, Community Fibre, EE, Hyperoptic, KCOM, NOW, Plusnet (up to April 2024), Post Office (up to March 2021), Shell Energy (up to July 2024), Sky, TalkTalk, Virgin Media, Vodafone and Zen Internet; other providers may offer lower prices.

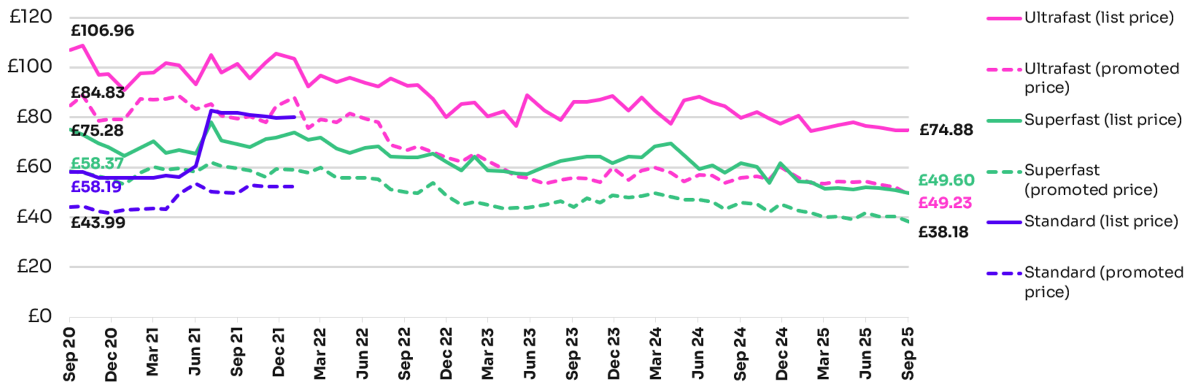
Triple-play bundle prices fell in real terms in the year to September 2025

Data collected from the UK's largest telecoms providers shows that 29% of bundles including broadband purchased by households at the end of June 2025 were triple-play (fixed broadband, fixed voice and pay TV) bundles, down from 31% in June 2024.

Using Pure Pricing tariff data, we have also looked at the average prices of triple-play bundles. None of the providers included in Pure Pricing's data offer triple-play bundles with standard broadband products, and in September 2025 there were slightly more ultrafast triple-play bundles than superfast bundles (ultrafast accounting for 53% of the total). We saw a fall in the average prices of these services in the year to September 2025, both for list and promoted prices. Average list and promoted prices for triple-play bundles with superfast broadband fell by 20% and 17% respectively in real terms, while those for similar bundles with ultrafast broadband fell by 6% and 12% respectively.

Our analysis shows that the average price differential for triple-play bundles fell slightly to £18.99 per month in the year to September 2025, with the average price differential for superfast bundles falling year on year, and that for ultrafast bundles increasing. The average price differential for a triple-play bundle with a superfast broadband product was £11.42 a month in September 2025, 28% lower than a year previously, while the average for a triple-play bundle with an ultrafast broadband product was £25.65 per month, a 6% increase.

Figure 26: Average monthly real-terms prices for residential triple-play fixed broadband, fixed voice and pay TV bundles: September 2020 to September 2025



Source: Ofcom / Pure Pricing's Monthly Broadband Pricing Tracker reports.
Notes: Values are the mean average prices of tariffs included in the dataset and are unweighted; most fixed broadband providers have stopped offering triple-play bundles with standard broadband (<30 Mbit/s) and as such, there is no data relating to these services after January 2022; chart represents monthly average of list and promoted available tariffs for new customers from BT, EE, Sky, TalkTalk, Virgin Media and Vodafone (no standard Virgin Media or Vodafone service; no ultrafast TalkTalk service); promotions include the promoted price and any 'gifts' offered; based on the price a new customer pays when they sign up and excludes the impact of any annual price rises; in this chart standard broadband products are those with an advertised speed <30Mbit/s, superfast ≥30Mbit/s to <300Mbit/s, ultrafast ≥300Mbit/s; adjusted for CPI (September 2025 prices).

Take-up of broadband bundles without a fixed voice service is growing, while dual and triple play bundle take-up falls

The proportion of out-of-contract customers varies widely by service combination, and year-on-year changes reflect shifting customer behaviour and levels of market engagement. One notable trend is the ongoing decline in fixed voice services, as mobile phones and online communications services increasingly become the primary means of contact. This is evidenced by Ofcom's Q3 2025 Telecommunications Market Data Update, which shows that the number of residential fixed voice lines fell by an estimated 12% to 17.3 million in the year to September 2025.

A consequence of this decline is customers moving to services that do not include voice services. For example, dual play (fixed broadband and fixed voice) customers may shift to standalone fixed broadband, while triple play (fixed broadband, fixed voice, and pay TV) customers may move to a fixed broadband and pay TV bundle.

Analysis of the data collected from the UK's largest operators for this report shows a 2.1 million drop in residential customers taking a fixed voice service in the year to June 2025. Most of these customers have moved away from dual-play (fixed broadband and fixed voice) and triple-play (fixed broadband, fixed voice and pay TV) bundles, where customer numbers fell by 1.2 million (15%) and 0.8 million (12%) respectively. In contrast, take-up of standalone fixed broadband and broadband and mobile phone bundles each increased by 0.6 million. Broadband and pay TV bundle take-up also grew, up by 17%, although this accounted for fewer than 0.1 million customers.[32]

The changes in take up of different bundle types have implications for the splits of in-contract and out-of-contract customers. People taking a bundle that includes a fixed voice service are more likely to be out-of-contract, as customers who are more engaged will have already made the decision to change their bundle and drop their fixed voice service, and will have switched away. This trend is already evident among dual-play fixed broadband and fixed voice customers, where the proportion of out-of-contract customers increased by 3 percentage points (pp) to 39% in the year to June 2025, and by 6pp in the previous year.

Figure 27: Number and proportion of in-contract and out-of-contract customers for standalone and bundled fixed broadband, by type of service: Q2 2024 and Q2 2025

Source: Ofcom / provider data.
Notes: All figures are rounded to the nearest number; provider data was collected from BT (incl. EE and Plusnet), KCOM, Sky, TalkTalk, Three, Virgin Media O2 and Vodafone.

[32] Data was not collected from smaller full-fibre broadband providers (altnets), and it is possible that some customers who discontinued their fixed voice service may have switched to these providers.

What customers spend on broadband

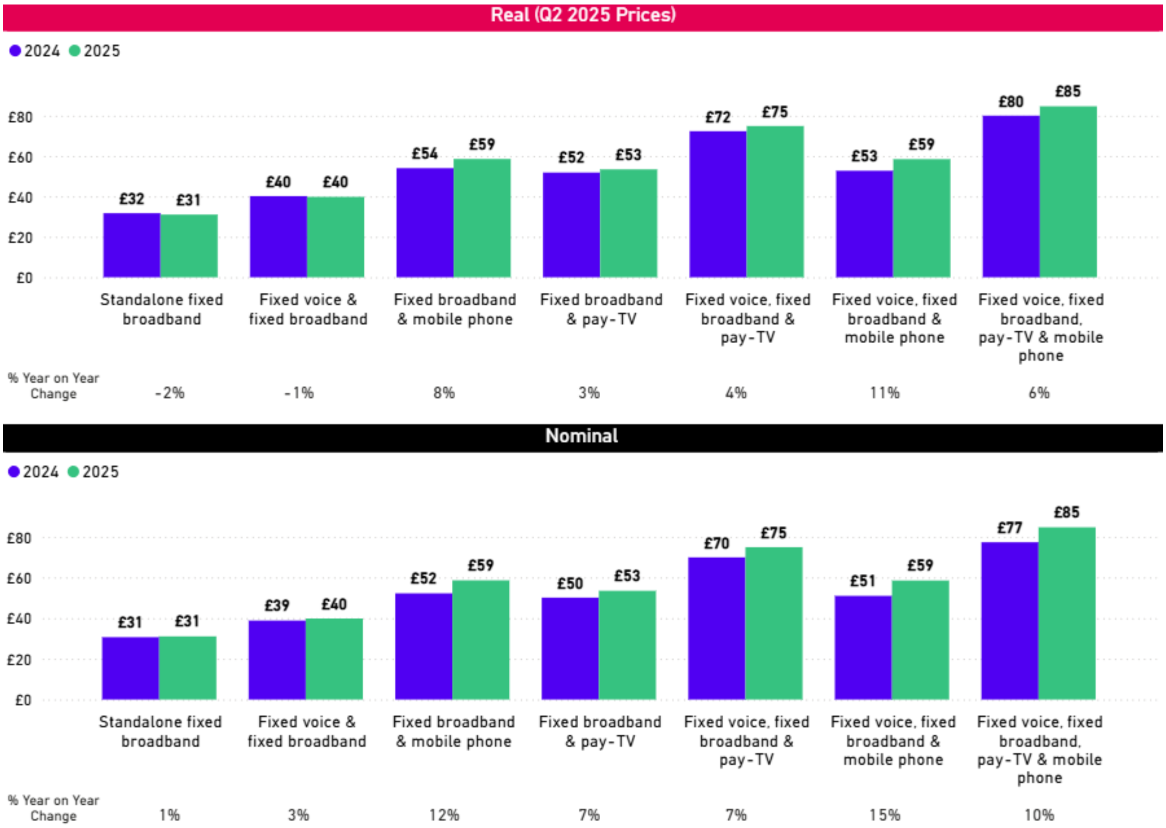
Average spend for standalone and dual play fell slightly but increased for all other fixed broadband bundles

In addition to reviewing published tariff data, we have analysed actual customer spend using data collected from the UK's largest operators.[33] This dataset includes all customers: those out of contract (whether on current or legacy packages) and those who are in contract, including first-time subscribers as well as those who have upgraded, downgraded or re-contracted.

Changes in average spend reflect a combination of operator-driven pricing changes; changes in the proportion of customers in- and out-of-contract; customers switching providers; and changes in service use such as migration to higher specification packages (e.g. faster broadband connections). This data provides insight into what services customers are buying and what they are paying for them.

Our analysis shows that the average monthly spend by standalone fixed broadband and dual play (fixed broadband and fixed voice) bundle customers fell slightly in real terms between Q2 2024 and Q2 2025, although there was a small increase in nominal terms. This suggests that while spend rose, the increase was below the rate of inflation. In contrast, average customer spend increased in both real and nominal terms for all other combinations with a fixed broadband component.

Figure 28: Average monthly spend for standalone and bundled fixed broadband customers, by type of service: Q2 2024 and Q2 2025



[33] Data was collected from BT (incl. EE and Plusnet), KCOM, Sky, TalkTalk, Three, Virgin Media O2 and Vodafone.

Source: Ofcom / provider data.
Notes: All figures are rounded to the nearest number; provider data was collected from BT (incl. EE and Plusnet), KCOM, Sky, TalkTalk, Three, Virgin Media O2 and Vodafone; real-terms figures are adjusted for CPI (Q2 2025 prices).

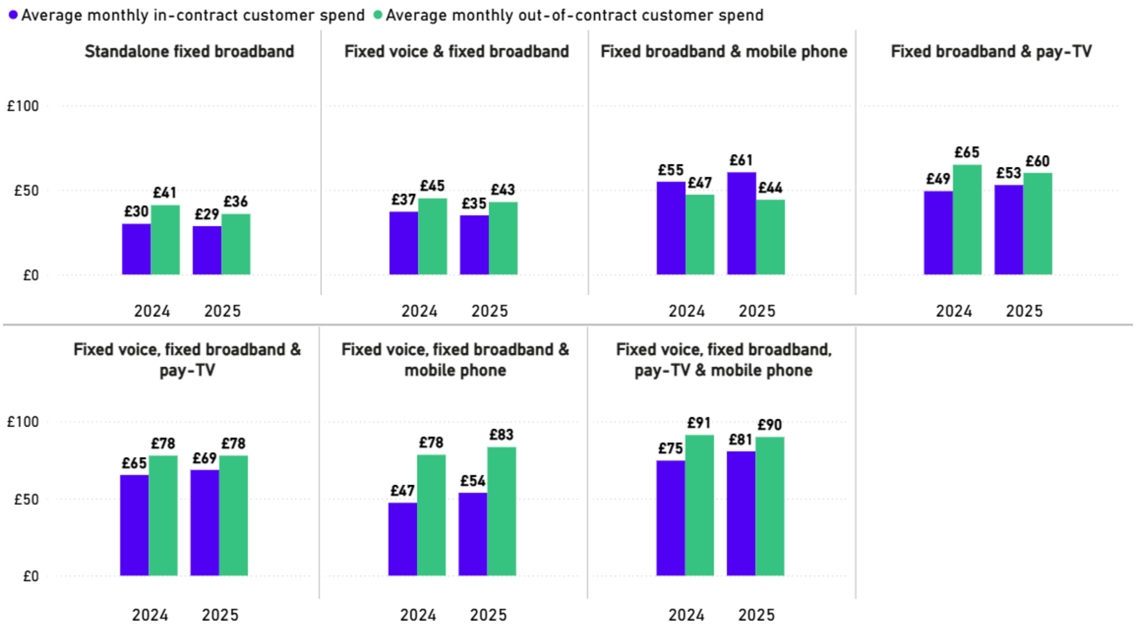
Out-of-contract customers tend to spend more than in-contract customers

Many providers offer promotions that lower the cost of services to new or re-contracting customers, although these discounted 'promoted' prices typically finish at the end of the customer's minimum contractual period, and they revert to paying the higher 'list price'.

The data collected from operators shows the impact of this. Compared to customers in contract, customers who were out-of-contract in Q2 2025 spent on average £7 a month more for standalone broadband, £8 more for dual-play fixed broadband and fixed voice bundles, and £9 more for triple-play fixed broadband, fixed voice, and pay TV bundles.

There was one exception: as in Q2 2024, out-of-contract fixed broadband and mobile phone bundle customers spent less in Q2 2025 than their in-contract counterparts. This relatively small segment has grown significantly as customers cancel their fixed voice service. The newly acquired customers may be more likely than the existing out-of-contract customers to have handset payments, which are included in the average monthly spend, and consequently, spend more than their out-of-contract counterparts.

Figure 29: Average in-contract and out-of-contract customer spend for standalone and bundled fixed broadband customers, by type of service (£/month): Q2 2024 and Q2 2025



Source: Ofcom / provider data.
Notes: All figures are rounded to the nearest number; provider data was collected from BT (incl. EE and Plusnet), KCOM, Sky, TalkTalk, Three, Virgin Media O2 and Vodafone; figures are adjusted for CPI (Q2 2025 prices).

Pricing of fixed voice services

Standalone fixed voice line rental pricing

When buying a fixed voice service, prices typically comprise line rental and calls charges, which can be bought as a package or paid for on a per-minute basis. Fixed voice services have historically been delivered through the UK's fixed telephone network, the public switched telephone network (PSTN), which is being phased out and replaced with digital Voice over Internet Protocol (VoIP) technology that delivers calls over broadband connections.

Standalone fixed voice is becoming less of a feature of the market. The move to digital voice is also accompanied by changes in consumer behaviour and a reduction in the number of people who use fixed voice services, with landline calls being replaced by mobile calls and calls via online communications services such as WhatsApp, Facebook Messenger and Apple Facetime.

Most fixed voice users purchase their service as part of a bundle alongside broadband and/or other communications services. Operator data collected for this report shows that standalone customers represented just 4% of all fixed voice customers. Few telecoms providers continue to offer standalone fixed voice services, and those that do tend not to sell them to new customers.

Most standalone fixed voice prices were unchanged year on year

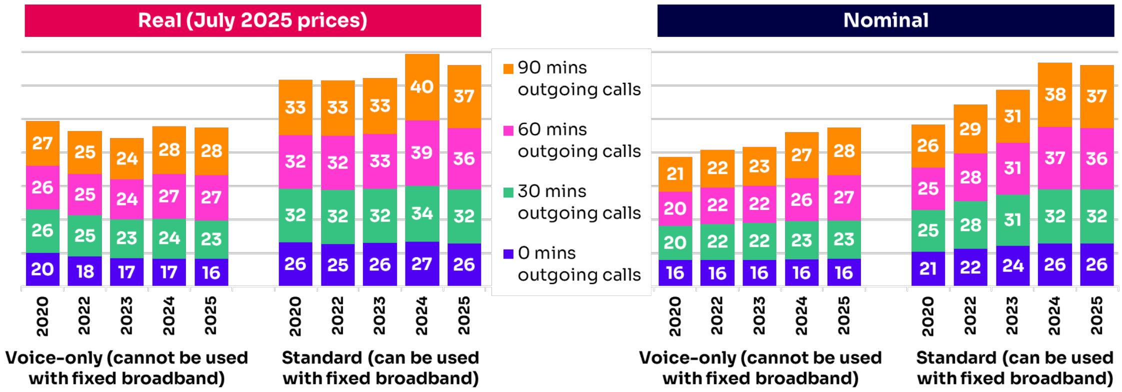
Customers buying a standalone fixed voice service fall into two groups:

- users who take a standalone fixed voice service and use a separately purchased fixed broadband service; and
- 'voice only' users who do not have a fixed broadband service

Using OECD's model, we have compared the weighted average prices of 'voice only' standalone fixed voice services (that cannot be used with a fixed broadband connection) and standard fixed voice tariffs (which can). To do this, we have used four fixed voice connections with varying call requirements. To represent customers who do not make outgoing calls but still use their landline to receive calls, we have set the outgoing call minute requirement for one connection to 0 minutes.

We found that 'voice-only' standalone packages were, on average, £9 per month cheaper than standard voice-only services across our four connections. The price of most services was unchanged year on year, and the small price fluctuations in our analysis were mainly driven by market share shifts (which impact our calculated weighted averages) and, for real-terms prices, inflation.

Figure 30: Average monthly price of fixed voice services for different usage profiles (£/month): 2020 to 2025

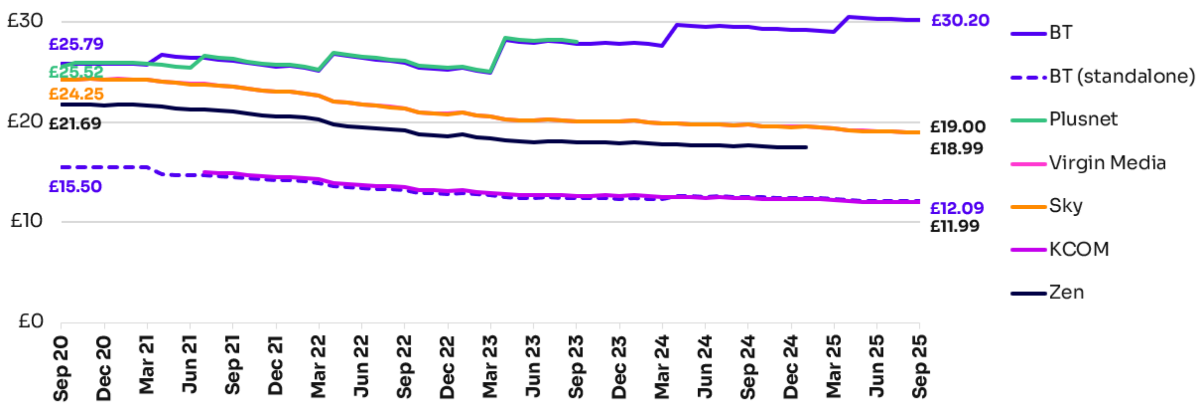


Source: Ofcom / OECD.
Notes: All figures are rounded to the nearest GBP; tariff data collected in July each year except for 2020, when it was collected in October; includes promoted discounts where available; outgoing call splits are 75% to UK landlines and 25% to UK mobiles; 60% during daytime, 25% in the evening and 15% at weekends; BT and Virgin Media are included for all years, 2020 also includes Post Office, and 2022 and 2023 include Shell Energy; voice-only standalone tariffs exclude BT Home Phone Saver, BT Line Rental Saver and BT Basic; standard standalone tariffs exclude BT Home Phone Saver, BT Line Rental Saver and BT Basic; analysis is based on tariffs available for a new customer that signs up and excludes the impact of any annual price rises; real-terms figures are adjusted for CPI (July 2025 prices).

Most providers' standard line rental charges have not changed

The only fixed voice provider included in our analysis whose line rental charge changed in the year to September 2025 was BT, which increased its standard residential line rental by 2% in real terms (6% in nominal terms). All other providers' line rental charges were unchanged year on year, and in September 2025 standard line rental charges ranged from £11.99 for KCOM to £30.20 for BT. Where providers did not change their prices, they all fell by just under 4% in real terms due to inflation.

Figure 31: Residential monthly line rental prices in real terms: September 2020 to September 2025



Source: Ofcom / Pure Pricing's Monthly Broadband Pricing Tracker reports.
Notes: Excludes line rental saver pre-payment tariffs (where offered); includes promotions; Virgin Media is not visible on the chart because its pricing is similar to Sky's i.e. the September 2024 Virgin Media's line rental charge is £19.00; adjusted for CPI (September 2025 prices).

Call package price trends are mixed

The monthly price of an evening and weekend call package increased by £0.14 in real terms (3%) to £5.33 per in the year to September 2025, while that of an anytime call package fell by £0.14 (1%) to £11.85 over the same period. In the five years to September 2025, the average evening and weekend landline call package price fell by £0.63 per month (10%) in real terms, while the average monthly price of an anytime call landline increased by 1% (£0.17 per month).

Figure 32: Average fixed voice call package prices in real terms (£/month): 2020 to 2025

	2020	2021	2022	2023	2024	2025		One year change	5-year change
Evening & weekend call bundle	£5.96	£5.62	£5.32	£5.09	£5.19	£5.33		3%	-10%
Anytime call bundle	£11.68	£12.14	£10.87	£11.26	£11.99	£11.85		-1%	1%

Source: Ofcom / Pure Pricing's Monthly Broadband Pricing Tracker reports, data as of September each year. Notes: Evening and weekend call package figures are the average of prices offered by BT (2019 only), NOW and Plusnet (up to 2023), Post Office (up to 2020), Shell Energy (2021 to 2023), Gigaclear (from 2022), Hyperoptic and TalkTalk (from 2023), Sky, Virgin Media, and Vodafone; anytime call package figures are the average of prices offered by BT, Community Fibre, Hyperoptic and KCOM (from 2022), EE, Sky, TalkTalk, Virgin Media, Vodafone, Zen, NOW and Plusnet (up to 2023), Post Office (up to 2020,) and Shell Energy; from October 2025, Virgin Media has included anytime calls as its default call plan option for customers taking Broadband & Phone, or Broadband, Phone & TV plans, when these plans previously only included Weekend calls; adjusted for CPI (September 2025 prices).

BT has made a range of price commitments for its standalone voice-only customers

BT offers an £18.11 per month line rental discount versus its standard line rental charge (of £30.20) to its standalone voice-only customers, as part of BT's voluntary commitment to this cohort of customers. whereby line rental price increases since April 2018 were capped at CPI+2.5% until March 2026, as well as a cap of CPI+0% on a basket of line rental and call packages over this period.

The monthly line rental charge for BT's standalone 'voice-only' fixed voice service was unchanged in nominal terms in the year to September 2025 remaining at £12.09, and fell in real terms.

Pricing of mobile services

Mobile service pricing based on average use continued to decrease

There are three main types of mobile airtime subscription:

- Traditional pre-pay subscriptions, where the customer must have a credit balance to use any services, and the cost of these services is deducted from this balance;
- Pay-monthly mobile services, where the customer typically pays a monthly fee for a set amount of data, calls and SMS messages and is billed retrospectively for the cost of any services outside these allowances; and
- Hybrid pre-pay tariffs offer inclusive allowances of data, calls and SMS messages (much like a pay-monthly service) but any use outside these allowances requires a pre-pay credit balance (as with traditional pre-pay services).

Monitoring mobile prices is challenging due to the large number of tariffs that are available and the complexity within these tariffs. The wide range of tariffs reflects both the number of providers, the tiered structure of data allowances resulting in numerous options designed to meet different usage needs, and the three different subscription types. Prices are further differentiated by factors such as whether a handset is included (and which model), international roaming provisions, the underlying mobile technology (e.g. 5G standalone), and additional benefits like streaming subscriptions.

This variety makes tracking mobile prices complex, and underlines the importance of consumers knowing their usage when comparing offers to enable them to secure the service that best meets their needs.

We have analysed the price of mobile tariffs using a basket-based approach based on average UK voice, SMS and data use, calculated from data collected by Ofcom as part of its regular information gathering programme.

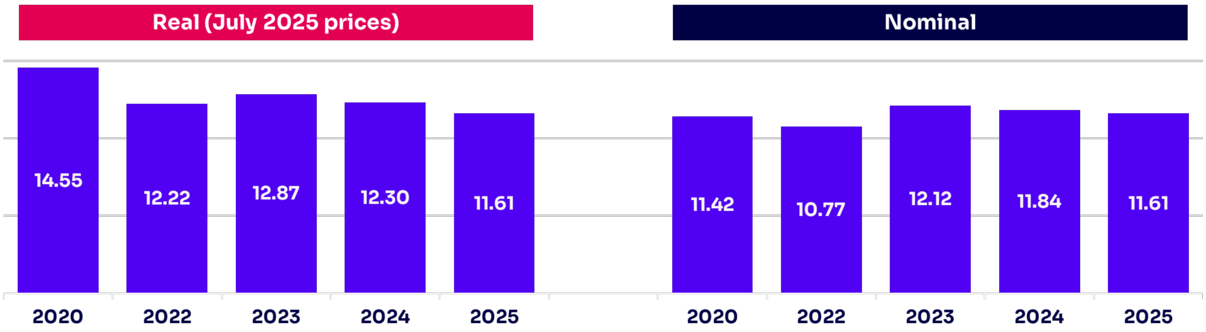
In most basket-based analysis, the services in the basket remain constant; however, in this analysis the basket changes from year to year to reflect shifts in average UK mobile usage over time. The baskets therefore take into account continued increases in average data use and declines in average call and SMS use, as consumers shift to online communications services such as WhatsApp, Facebook Messenger, and Apple Facetime.

We use OECD’s pricing model to determine the lowest available prices (excluding handset costs) for each year's usage basket, based on the tariffs offered by providers included in the model. We then calculate a weighted average using the market shares of those providers.

This analysis is useful as it captures overall shifts in the use of services and prices available based on average use, but it does not necessarily reflect actual customer behaviour in terms of the tariffs they choose. Later in this chapter we also look at customer spend, which provides insight on what customers are billed and how these bills vary by what’s included in their tariff and how much data they use.

Although average data use more than doubled from 2020 to 2025 (while call minutes and SMS volumes declined) the price of the basket decreased by 20% in real terms in the five years to 2025; in nominal terms it increased by 2% over this period. The price of the basket fell in both real and nominal terms in the year to July 2025, down by 6% and 2% respectively.

Figure 33: Weighted average monthly prices for average mobile use, excluding handset cost (£/month): 2020 to 2025



Average monthly use	2020	2022	2023	2024	2025 (E)		1 year Δ	5 year Δ
Data (GB)	4.4	7.1	8.4	9.2	10.2		10%	130%
Minutes	198	177	165	155	147		-6%	-26%
SMS	51	38	32	28	24		-14%	-53%

Source: Ofcom / OECD.
Notes: Based on prices excluding handset costs; includes promoted discounts; data relates to July in each year except 2020, when it relates to October; analysis is based on tariffs available for a new customer who signs up, and excludes the impact of any annual price rises; average mobile data use includes residential and business customers; average call and messaging use includes handset connections only; average data use includes handset connections; 2025 usage figures are estimated based on 2024 operator data; real-terms figures are adjusted for CPI (July 2025 prices).

The average prices of most of our mobile connections fell in 2025

To analyse how prices have changed over time for different types of mobile user, we use OECD's model to look at the weighted average prices for six 'baskets' of services on a mobile phone connection, each requiring a set amount of data, minutes, and SMS messages.[34] Unlike the analysis of the price of a basket based on average usage in each year shown above, when looking at the prices of these six baskets, the use is constant over time.

In the five years to July 2025, average prices declined for five of the six connections, with the average across all six falling by 34% in real terms (16% nominal). Only the price of the lowest-usage connection (a voice-only connection with 50 minutes of outgoing calls per month) increased during this period, rising by 15% in real terms and 47% in nominal terms. This increase was related to fewer providers offering mobile services without any data or with very low data allowances, making the cheapest options for this connection more expensive tariffs with larger data allowances.

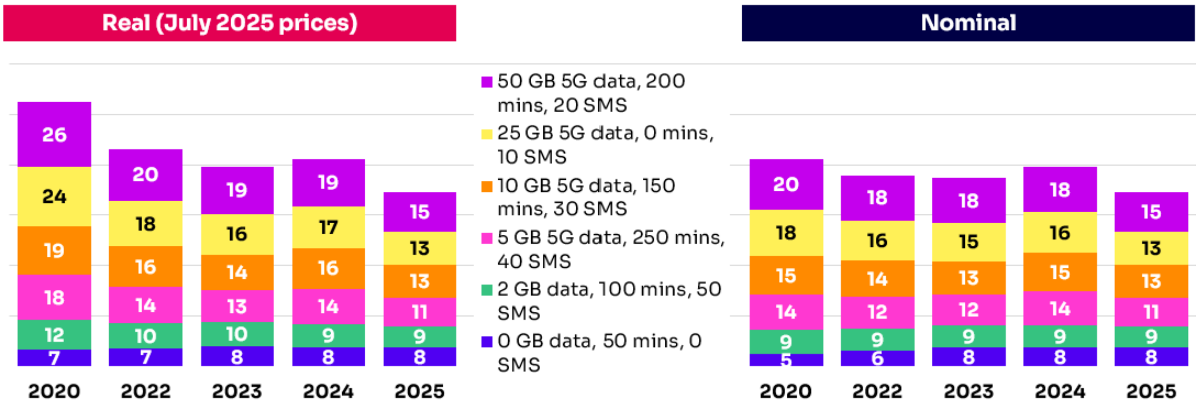
In the year to July 2025, the weighted average price of five of the six connections fell in real and nominal terms. Again, the exception was the lowest-usage connection, whose price fell by 3% in real terms but increased slightly (by 1%) in nominal terms. In real terms, the total price of the six connections declined by 16% over the same period, an average monthly fall of £2.23 per connection.

The three connections with the largest proportional declines were those with monthly data requirements of 5 GB, 10 GB, and 25 GB, whose weighted average prices all fell by 20% year on year.

[34] More details of the methodology used can be found in Annex 1.

In nominal terms, the total price across the six connections fell by 13% year on year; the price of the two lowest-usage connections was largely unchanged.[35]

Figure 34: Weighted average monthly prices of standalone mobile tariffs (£/month, excluding handset cost): 2020 to 2025



Source: Ofcom/OECD.
Notes: All figures are rounded to the nearest number; data relates to July in each year except 2020, when it relates to October; analysis is based on tariffs available for a new customer who signs up, and excludes the impact of any annual price rises; real-terms figures are adjusted for CPI (July 2025 prices).

Comparing ways to buy a handset

It is usually more expensive to buy a handset with a mobile contract

Data collected from the UK's largest mobile providers for this report shows that 37% of UK residential pay-monthly mobile phone subscriptions included a handset in June 2025.[36]

When a customer acquires their handset from a mobile provider along with airtime, it is done in one of two ways: as two separate (split) contracts (one for the handset and one for the airtime), or as a single (combined) contract which covers both handset and airtime. Most mobile providers have stopped offering combined contracts and now offer only split contracts.

Buying a handset along with airtime from a mobile provider can be beneficial as it allows the user to spread the cost of the handset across the airtime's minimum contractual period, or longer, often at low, or no, upfront cost. However, this can come at a higher overall cost compared to buying the handset outright and using it with a SIM-only plan.

To compare the prices consumers pay when purchasing a handset outright and using it with a SIM-only plan, versus buying both the handset and airtime from a mobile provider, we assigned each mobile of our six usage profiles a low-, mid- or high-range handset. Using the OECD model, we then calculated the weighted average monthly cost of acquiring the assigned handset and meeting the usage requirements for each connection.

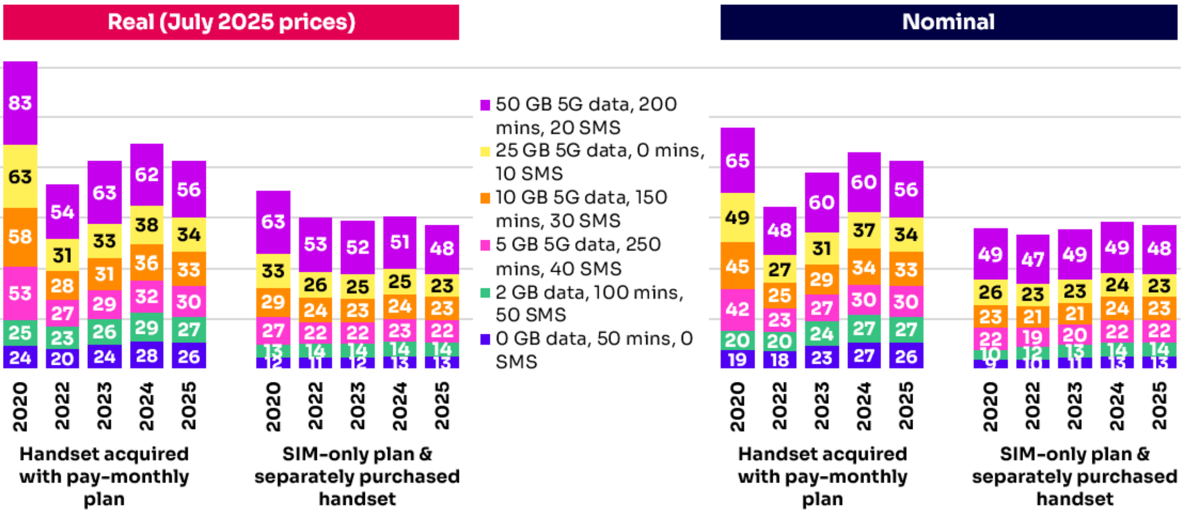
Across all six mobile connection types, we found that purchasing a handset outright and using it with a SIM-only plan was, on average, £10.54 per month cheaper than buying the handset and airtime

[35] Changes were less than £1.00.
[36] This was equivalent to 27% of all UK residential mobile phone subscriptions (i.e. pay-monthly and pre-pay).

together from a mobile provider.[37] However, this comparison does not account for additional benefits that may be included when acquiring a handset through a provider, such as extended warranties, inclusive roaming, or bundled entertainment services.

Across the six user profiles we analysed, savings from purchasing a handset separately and pairing it with a SIM-only plan ranged from 15% to 50%. The largest monthly saving was for the connection with no data use (£12.91), followed by the lowest data connection (£12.66), while the connection offering 5 GB of data had the smallest saving (£7.70 per month).

Figure 35: Weighted average monthly price of handset with pay-monthly, or purchased separately to use with SIM-only plan (£/month): 2020 to 2025



Source: Ofcom / OECD.
Notes: All figures are rounded to the nearest number; ; analysis is based on tariffs available for a new customer who signs up, and excludes the impact of any annual price rises; weighted average tariffs from the UK's largest providers: BT (incl.EE and Plusnet), giffgaff, iD Mobile, Lebara, Lyca Mobile, Sky Mobile, Talkmobile, Tesco Mobile, Three, VMO2 (incl. O2 and Virgin Mobile), and Vodafone; data relates to July in each year except 2020, when it relates to October; Profiles from 0 GB to 2 GB were allocated basic handsets (Alcatel 10.66G in 2020, Nokia 105 in 2022–2023, Nokia 106 in 2024–2025), profiles with 5–25 GB 5G data usage were allocated the Samsung Galaxy A-series (A21s in 2020, A22 in 2022, A23 in 2023, A35 in 2024, A36 in 2025), and the 50 GB profile was assigned Samsung Galaxy S-series phones (S20 in 2020, S22 in 2022, S23 in 2023, S24 in 2024, S25 in 2025) real-terms figures are adjusted for CPI (July 2025 prices).

It can cost significantly more to buy an iPhone from a mobile provider

To further understand the cost to consumers of purchasing a handset from a mobile provider along with their airtime, we compared prices offered by the three UK MNOs' main brands for an iPhone 17 and airtime, with costs incurred when purchasing the device separately and using it with a SIM-only airtime contract. We look at the price for a contract with an iPhone 17 as these are widely available and there tends to be little variation in the handset price when purchased on a SIM-free basis.

[37] This analysis matched the handsets to the user profile of each connection, associating a basic featurephone for low-usage connections and smartphones for the higher-usage connections (details in Annex 1).

We found that while an iPhone 17 256 GB cost £799 to buy outright, the cost of buying the same handset from a provider along with a pay-monthly mobile tariff was significantly higher.[38] Our analysis showed that subscribers taking one of the 24-month pay-monthly contracts that we looked at would pay an average of £999 for their handset, a 25% premium. This equated to over £8 per month, or £200 over the 24-month minimum contractual period.

The price premium for purchasing the handset from one of the main brands along with an airtime contract varied significantly, ranging from £23 to £428, again highlighting the importance of shopping around to find the best deal.

For one brand, the price premium was equivalent to taking a loan for the handset with an APR[39] of 47%, more than the rates offered by many credit cards. While some consumers may not be able to afford to purchase a handset upfront, those who can pass the required credit checks are likely be able to finance the handset at a much lower rate than this.

Figure 36: Example comparisons of post-pay with handset and separate handset with SIMO prices: September 2025

		MNO brand 1	MNO brand 2	MNO brand 3	MNO brand 4
24 month pay-monthly with handset	Upfront cost	£30.00	£30.00	£30.00	£30.00
	Monthly cost	£70.86	£80.86	£68.99 (average)	£64.86
	Total cost (1)	£1,730.64	£1,970.64	£1,685.64	£1,586.64
Equivalent SIM-only tariff	Monthly price	£32.00	£31.00	£36.00	£32.00
	Total cost (2)	£768.00	£744.00	£864.00	£600.00
iPhone 17 256GB	Amazon.co.uk	£799.00	£799.00	£799.00	£799.00
	With monthly plan = (1) - (2)	£962.64	£1,226.64	£821.64	£986.64
Premium when phone is acquired with airtime		£163.64	£427.64	£22.64	£187.64
Amount of 'loan' (£799 - upfront cost)		£769.00	£769.00	£769.00	£769.00
	Calculated APR	19%	47%	3%	22%

Source: Ofcom / operator websites.
Notes: Tariff data as of September 2025; 'average' indicates that there was a promoted offer and the monthly price shown is an average taking this into account; analysis excludes annual price increases (which will apply to the airtime element of a mobile service bought with a handset or on a SIM-only basis).

SIM-only mobile pricing

SIM-only pay-monthly and hybrid pre-pay prices are falling in real terms for tariffs with higher inclusive data allowances

Operator data collected from the UK's largest mobile operators show that SIM-only pay-monthly subscriptions made up half (50%) of all residential mobile phone subscriptions at the end of June 2025, up from 44% a year previously.[40]

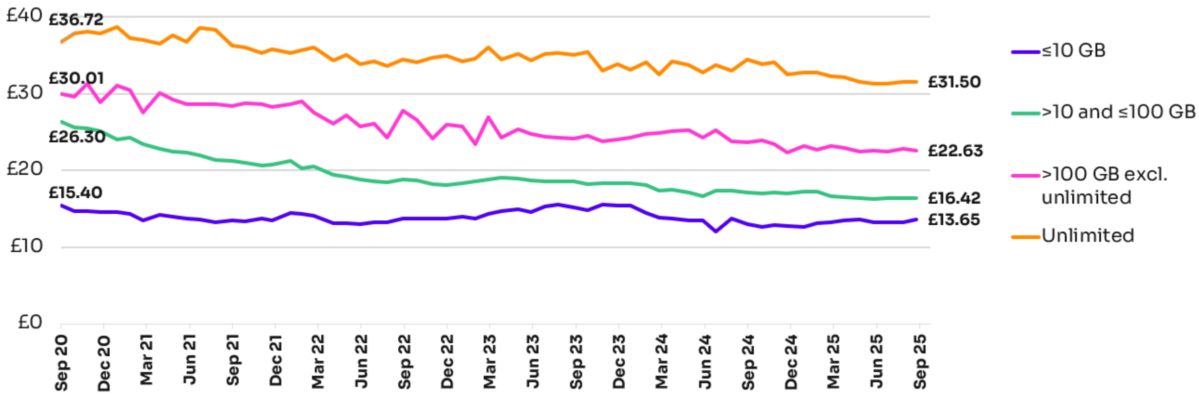
[38] This analysis compares each brand's cheapest 24-month tariff with a £30 upfront cost offering unlimited data, calls and texts and an iPhone 17 256 GB to the total cost of an equivalent SIM-only service and purchasing the handset outright.
[39] An annual percentage rate (APR) is the annual rate charged for borrowing or earned through an investment and is expressed as a percentage that represents the actual yearly cost of funds over the term of a loan.
[40] These figures are overstated as some providers report split contract mobile customers (where they provide airtime and a device to the customer under separate contracts) as being SIM-only, as the mobile element of

The analysis below shows the average price of SIM-only pay-monthly and hybrid pre-pay mobile tariffs using tariff information taken from Pure Pricing's Monthly Mobile Pricing reports. Average SIM-only prices fell in real terms for three of the four data allowance categories we looked at in the year to September 2025. The largest percentage fall was in the price of tariffs with an 'unlimited' monthly data allowance, which fell by an average of 8% in real terms, while connections with a finite data allowance of 100 GB per month or more and those with over 10 GB and up to 100 GB of data per month both fell by 4% year on year.

Only the category containing SIM-only tariffs with the lowest monthly data allowances (those with 10 GB of data or less) rose in price in the year to September 2025, up by 5% in real terms and 9% in nominal terms. This continues the trend observed in previous years, as providers seek to reduce the price difference between lower and higher-tier tariffs to encourage customers to upgrade to a more expensive tariff offering a larger data allowance.[41]

In nominal terms, the average prices of tariffs offering over 10 GB and up to 100 GB, over 100 GB of data (excluding 'unlimited' tariffs), and 'unlimited' data tariffs fell by less than 1%, 1% and 5% respectively.

Figure 37: Average promoted pay-monthly SIM-only and hybrid pre-pay SIM-only mobile prices in real terms (£/month): September 2020 to September 2025



Source: Ofcom / Pure Pricing's Monthly Mobile Pricing reports.
Notes: This analysis differs from that included in previous reports because we have used different data allowance categories, and the figures also include hybrid pre-pay tariffs (the previous analysis included only pay-monthly tariffs); values are the mean average prices of tariffs included in the dataset and are unweighted; represents average monthly promoted prices for available tariffs for new customers from BT, EE, iD Mobile, Lebara, Lyca Mobile, O2, Plusnet (up to March 2023), Sky, SMARTY, Tesco Mobile, Three, Virgin Mobile (until August 2023), Vodafone and VOXI; the average monthly prices shown include price promotions where offered; based on the price a new customer pays when they sign up and excludes the impact of any annual price rises; adjusted for CPI (September 2025 prices).

Smaller mobile providers continue to offer the lowest prices for pay-monthly SIM-only mobile tariffs

As we have done with dual-play superfast broadband and fixed voice services elsewhere in this report, we have used Pure Pricing's Monthly Mobile Pricing reports to identify the lowest-priced

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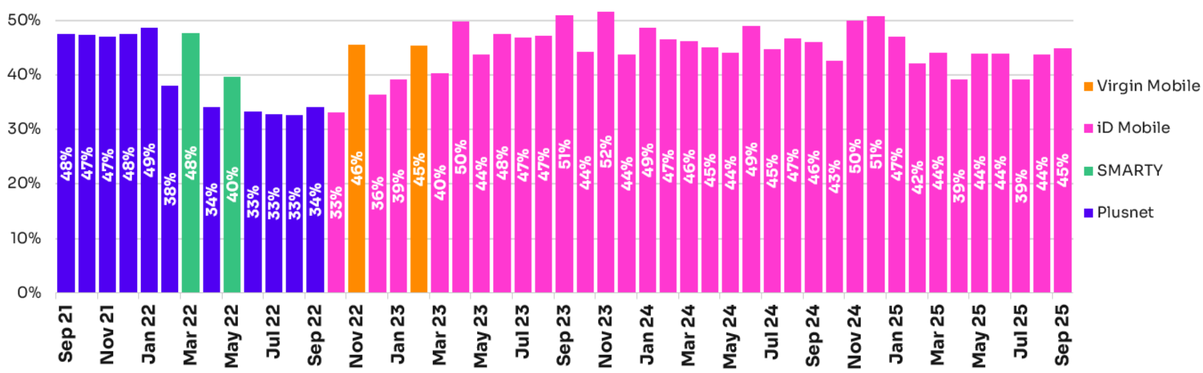
the contract is provided as a SIM-only service; giffgaff was not included in the 2024 operator data collection, and has also been excluded from the 2025 figure shown here to enable like-for-like year on year comparability.
[41] In some cases, it may also reflect some providers starting to offer lower-tier services with additional benefits (such as roaming and entertainment services) which were previously only offered with higher-tier services.

providers. For this analysis, we look at pay-monthly SIM-only mobile phone tariffs with an inclusive monthly data of >10 GB and ≤100 GB. It should be noted that Pure Pricing's tariff data does not include some of the smaller providers, which may offer lower prices than the providers shown here.

Our analysis shows that mobile network operators' (MNOs) main brands did not offer the lowest prices for these tariffs in any month from September 2021 to September 2025. Instead, the lowest prices were offered either by mobile virtual network operators (MVNOs), which use the MNOs' networks to provide service, or by the MNOs' budget brands.

Of the providers included in Pure Pricing's dataset, iD Mobile offered the lowest-priced pay-monthly SIM-only prices for tariffs with over 10 GB and up to 100 GB of inclusive data in every month from March 2023 to September 2025. In September 2025, iD Mobile's prices were, on average, 45% lower than the unweighted average price across all the tariffs in this category (£16 per month), down from 46% in September 2024.

Figure 38: Lowest-priced pay-monthly SIM-only mobile with >10GB and ≤100GB monthly data allowance: September 2021 to September 2025 (bar heights show the percentage saving when comparing the lowest-priced provider and the average price)



Source: Ofcom / Pure Pricing's Monthly Mobile Pricing reports.
Notes: All figures are rounded to the nearest percentage; Pure Pricing's Monthly Mobile Pricing Tracker reports during the period above include the pay-monthly SIM-only tariffs with >10GB and ≤100GB monthly data allowances offered by BT, EE, giffgaff, iD Mobile, Lyca Mobile, O2, Plusnet (up to March 2023), Sky, Tesco, Three, Virgin Mobile (until August 2023) and Vodafone; other providers may offer lower prices.

Providers are tiering mobile tariffs by features other than data allowance

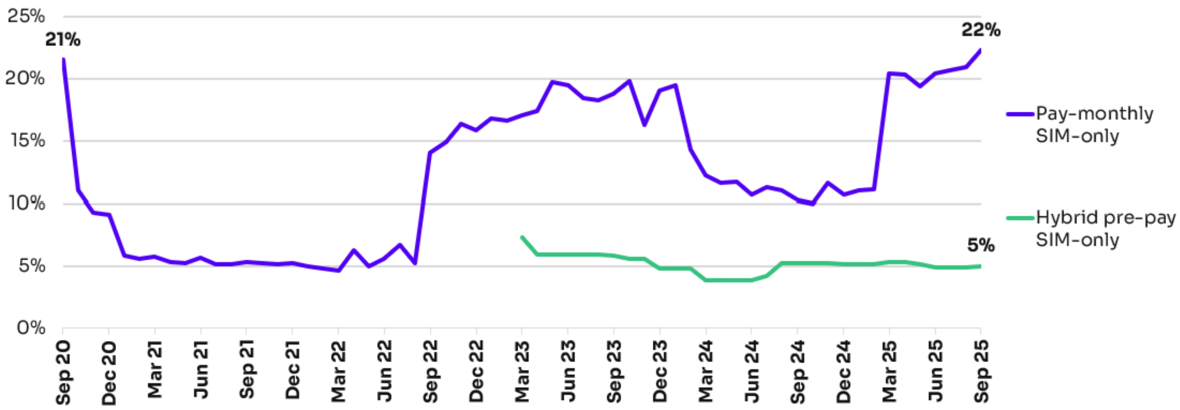
Over the last few years, there has been a shift towards mobile tariffs that provide unlimited UK calls and text messages, with the main factor determining the price of a tariff being the amount of inclusive data. However, actual average data use remains considerably lower than the data allowances included in most mobile tariffs: according to our Communications Market 2025 Report, average monthly mobile data use was 10.3 GB among mobile data users.

Mobile providers have looked for ways to differentiate their tariffs using features other than data allowance, such as the inclusion of international roaming, access to newer technologies including 5G standalone, and/or subscriptions to music and video streaming services. One way they have done this is to tier tariffs according to their maximum connection speed, enabling mobile users with less bandwidth-hungry needs to select more cost-efficient tariffs.

Using data from Pure Pricing's Monthly Mobile Pricing reports, we have calculated the proportion of pay-monthly and hybrid pre-pay SIM-only tariffs that have a capped maximum speed. This shows that among the providers whose tariffs are included in Pure Pricing's reports, almost a quarter (22%) of pay-monthly SIM-only tariffs had a capped speed in September 2025, a much higher proportion than the 5% among hybrid pre-pay SIM-only tariffs. The maximum connection speeds offered by these tariffs were limited to either 10 Mbit/s, 25 Mbit/s or 100 Mbit/s.

While the proportion of speed-limited hybrid pre-pay SIM-only tariffs has remained relatively flat, it has fluctuated significantly among pay-monthly SIM-only tariffs, suggesting that some providers are experimenting with speed-limited tariffs to identify how best to implement them.

Figure 39: Proportion of pay-monthly SIM-only and hybrid pre-pay SIM-only tariffs with a capped connection speed: September 2020 to September 2025



Source: Ofcom, using data from Pure Pricing Monthly Mobile Pricing reports.

Pay-monthly versus pre-pay mobile tariffs

Pre-pay tends offer better value than pay-monthly for low-usage customers

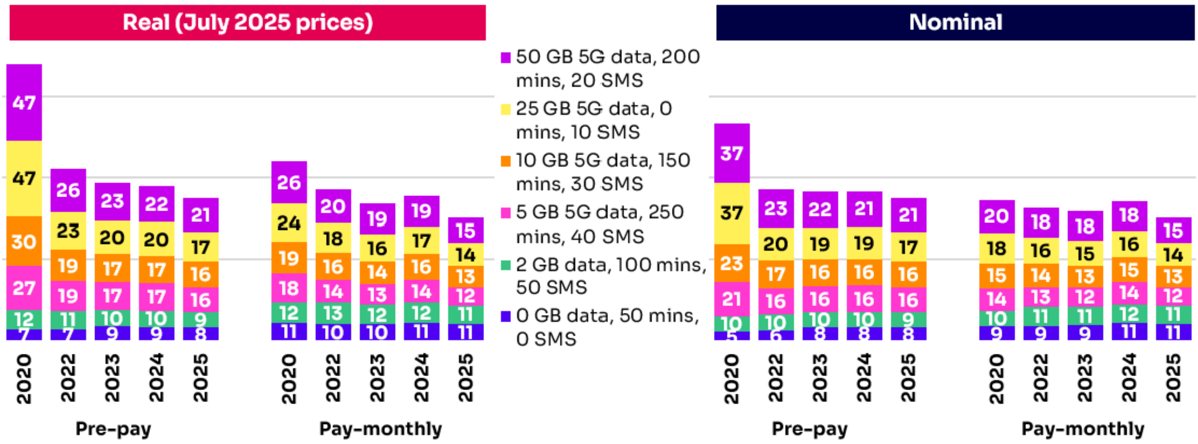
Using OECD's pricing model, we have analysed the weighted average monthly pre-pay and pay-monthly prices for our six mobile connections with varying usage requirements.

We found that the weighted average pre-pay prices of the two lowest data-usage connections (one of which only needs voice calls and another requiring 2GB of data) were lower than those using pay-monthly tariffs, with average savings of £2 per month and proportional savings of 19%. Conversely, the four connections with the highest data requirements cost an average of £4 per month more when using pre-pay tariffs than the available pay-monthly options (between 21% and 36%).

Our analysis also shows that the average pre-pay and pay-monthly prices across our six connections both fell in the year to July 2025. In real terms, the pay-monthly prices fell by an average of 15%; the largest decreases were for the three highest data allowance connections (all down 18%). Pre-pay prices also fell over this period, down by an average of 7%, with the largest annual fall (13%) for the price of the connection requiring 25 GB of data.

In nominal terms, the total pre-pay and pay-monthly prices of our six connections fell in the year to July 2025, down by averages of 4% and 12% respectively.

Figure 40: Weighted average monthly pre-pay and pay-monthly mobile price, excluding handset cost (£/month): 2020 to 2025



Source: Ofcom / OECD.

Notes: All figures are rounded to the nearest number; data relates to July in each year except 2020, when it relates to October; the 5 GB data, 250 mins, 40 SMS basket, 10 GB data, 150 mins, 30 SMS basket, 25 GB data, 0 mins, 10 SMS basket and 50 GB data, 200 mins, 20 SMS basket require 5G connectivity; pre-pay tariff prices were notably higher in October 2020 due to the limited availability of 5G options but fell in 2022 as more providers introduced 5G-enabled pre-pay tariffs at lower price points; real-terms figures are adjusted for CPI (July 2025 prices).

Pay-monthly and hybrid pre-pay tariffs have a similar cost per GB of data

Both pay-monthly and hybrid pre-pay tariffs provide customers with an inclusive allowance of data, calls and texts which usually expires after a month, and we can calculate the average cost per gigabyte (GB) of data purchased by dividing a tariff's monthly price by the amount of inclusive data it offers.

Based on Pure Pricing's Monthly Mobile Pricing report for September 2025, the average price per GB of inclusive data was £0.12 for both pay-monthly and hybrid pre-pay SIM-only mobile tariffs. For pay-monthly SIM-only tariffs, this represented a 7% fall (1p per GB) in real terms year on year, while for hybrid pre-pay SIM-only mobile tariffs, it was a 17% (2p per GB) fall.

Hybrid pre-pay tariffs offered a lower average price per GB than pay-monthly across the three lowest data allowance categories in our analysis. For allowances up to 1 GB per month, hybrid pre-pay tariffs' cost/GB was less than one-third that of equivalent pay monthly tariffs, and for >1 GB and ≤10 GB, they were less than half the price, while >10 GB and ≤100 GB prices per GB were 43% cheaper.

For data allowances above 100 GB (excluding 'unlimited' data packages), pay-monthly tariffs were slightly cheaper, by around 1p per GB (12%). However, for unlimited data,[42] both tariff types had the same average cost per GB at £0.06.

The lower price per GB for hybrid pre-pay tariffs for data allowances up to 100 GB is likely due to the budget brands which tend to offer these plans, focusing on value and flexibility,[43] rather than the

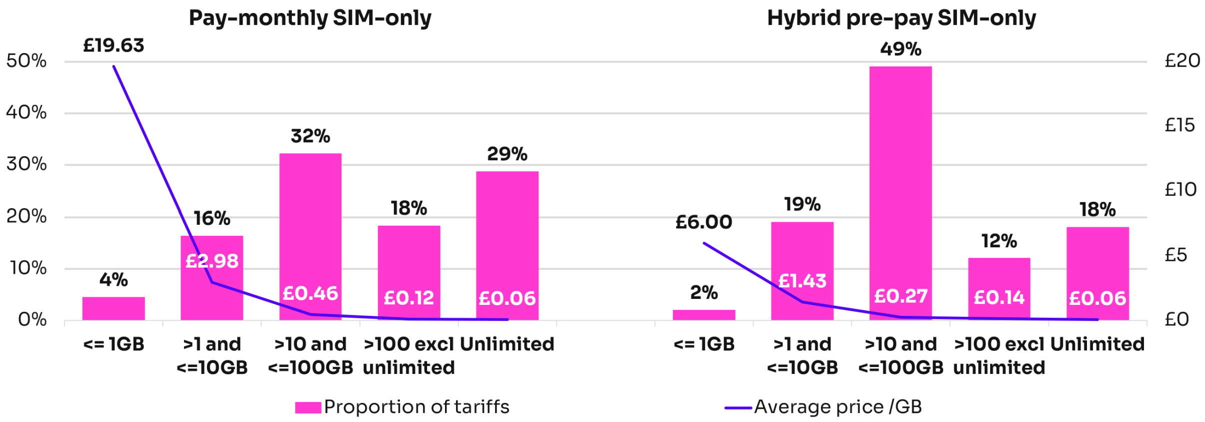
[42] In calculating the average cost per GB of data for tariffs with 'unlimited' data, we assume a 500 GB per month allowance.

[43] Hybrid pre-pay tariffs typically provide flexibility by enabling customers to access mobile services without long-term contracts, which allows customers the option of adjusting their spend based on their usage needs.

premium features often included in pay-monthly tariffs, such as O2's Priority rewards or Vodafone's VeryMe programme – which provide benefits such as early access to event tickets and discounts on food and drink.

Later in this section we look at the cost per GB of data purchased and consumed, using customer-level data.

Figure 41: Distribution of SIM-only pay-monthly and hybrid pre-pay tariffs, by data allowance and average cost per GB of data: September 2025



Source: Ofcom / Pure Pricing's UK Monthly Mobile Pricing report, September 2025.
Notes: Average cost per GB and average data allowance in the Unlimited category assumes a 500 GB allowance.

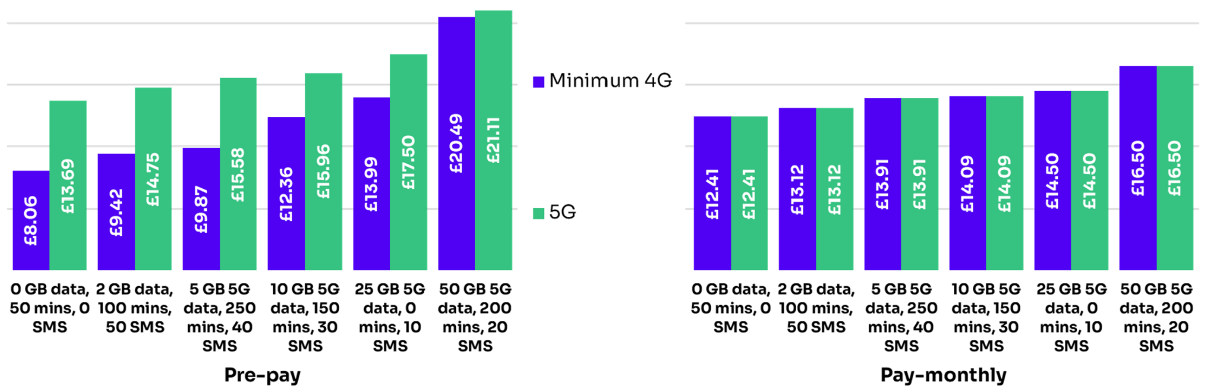
Some pre-pay tariffs continue to have a 5G price premium

The weighted average pre-pay prices of our four highest-usage connections were higher than their pay-monthly prices in July 2025, partly because they require 5G mobile connectivity which comes as standard with pay-monthly tariffs but is not included in some lower-cost pre-pay tariffs.

In this analysis, we compared the weighted average monthly price of fulfilling our six mobile connections with tariffs offering 5G connectivity and those offering a minimum of 4G connectivity. We found that while pay-monthly tariffs did not carry a price premium for 5G (and average 4G and 5G prices were the same), pre-pay tariffs did, with premiums ranging from £0.62 to £5.71 per month, averaging £4.06 (33%) per month across the six connections.

When 5G connectivity is not needed, pre-pay was cheaper for all except the highest- usage connection which was £3.99 per month more expensive.

Figure 42: Comparison of 4G minimum and 5G SIM-only mobile pricing: July 2025 (£/month)



Source: Ofcom /OECD.

Using customer-level data to understand trends in mobile spend and value

Average spend on mobile services

In this section, we use anonymised customer-level data collected from mobile operators to analyse average monthly spend on mobile services from Q1 2019 to Q2 2025.[44] This updates and extends the analysis originally published in our Monitoring Consumer Outcomes in the Mobile Sector report and allows us to look at how changes in the prices of tariffs, including in-contract price increases, affect customer spend.

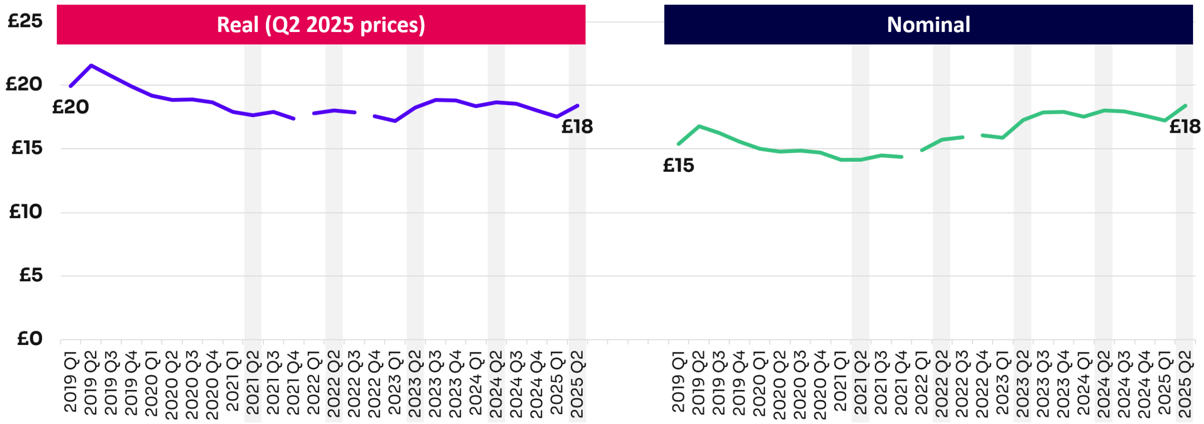
Our analysis looks at SIM-only pay-monthly mobile contracts, where consumers buy mobile airtime without a handset.[45] These contracts typically provide an allowance of data, calls, and text messages. In our analysis, spend is calculated as the average monthly amount charged to consumers in our dataset in each quarter from Q1 2019 to Q2 2025, and includes VAT. We present our findings in both real terms (i.e. having adjusted for CPI inflation) and in nominal (unadjusted) terms.

Our analysis covers a period of abnormally high inflation, which led to some customers experiencing large annual in-contract price rises in 2022 and 2023 (as these were typically linked to inflation indices at the time).[46] The most recent data (Q1 and Q2 2025) also covers the period following the January 2025 introduction of new Ofcom rules to ban new telecoms contracts with inflation-linked in-contract price rises, which require telecoms providers to set out any price rises in new customer contracts in pounds and pence; however, it is not possible to assess the impact of the new rules as most customers in this dataset are on contracts pre-dating the change in rules.

The analysis suggests that between Q1 2019 and Q2 2025, average SIM-only spend fell by about 8% (c.£1.50 per month) in real terms and increased by 20% (£3 per month in nominal terms). The increase in customer bills between 2023 and 2025 occurred during a period of abnormally high inflation. There is evidence of the impact of these price rises in the spend data, with average spend increasing in both real and nominal terms in the second quarter of each year from 2022 to 2025, when in-contract price rises were applied to many customers' bills. Overall, the fact that average spend has been falling in real terms suggests that most customers continue to get good value from their mobile service.

[44] The mobile operators that provided customer-level data sent a sample relating to c.5% of their customer base. For a detailed overview of the customer-level data we collect from mobile providers, see the Monitoring Consumer Outcomes in the Mobile Sector report (p.6–7).
[45] Within our sample, the proportion of subscriptions that were SIM-only services increased from 37% in Q1 2019 to 63% in Q2 2025, with a corresponding reduction in the proportion of other types of contract (notably, combined handset and airtime subscriptions and split subscriptions). This shift – which is driven by consumers deciding to use their handset for a longer period or to purchase the handset separately – suggests that at least a non-negligible proportion of consumers are actively evaluating their choices in the market.
[46] From 2020, many UK mobile providers introduced inflation-linked price variation terms with an additional fixed percentage for new contracts, e.g., Consumer Price Index (CPI) plus 3.9% effective from the following spring.

Figure 43: Average monthly spend, SIM-only pay-monthly mobile customers: Q1 2019 to Q2 2025[47]



Source: Ofcom, based on mobile providers' customer-level data.
Notes: Based on pay-monthly SIM-only contracts; data collected in different tranches (Q1 2019 to Q4 2021; Q1 2022 to Q2 2023; Q3 2023 to Q2 2024; and Q3 2024 to Q2 2025); data for the period Q1 2019 to Q2 2023 exclude some providers (iD Mobile, O2, Talkmobile and Vodafone: entire period; Sky and Three: some months only) with incomplete data in the period; breaks in series due to one or more providers submitting non-reconcilable data across tranches or incomplete data; grey bars indicate Q2 of each year from 2021 onwards, when in-contract price rises were typically implemented; real-terms figures are adjusted for CPI (Q2 2025 prices).

Average monthly spend per GB data purchased and consumed

When looking at trends in customer spend, it is important to note that customers have been buying and using larger amounts of mobile data over recent years.

The customer-level data received from providers shows that the mean average amount of data purchased by SIM-only pay-monthly mobile customers increased by over 500% (from 19 GB to 122 GB per month) between Q1 2019 and Q2 2025,[48] while the average volume of data they consumed increased by over 300% (from 3 GB to 13 GB per month) over the same period. As shown earlier in the report, analysis of data from Pure Pricing's Monthly Mobile Tracker reports indicates that average SIM-only prices for higher data allowances have fallen, while prices for lower allowances (10 GB or less) have increased in the year to September 2025.

The chart below looks at both the average spend per GB of data purchased by SIM-only pay-monthly users and the average spend per GB of data they consumed between Q1 2019 and Q2 2025. The decline in average monthly spend per GB shows that the effective price of data for consumers has been falling and, overall, consumers are paying less than ever for mobile data.[49]

Our analyses therefore indicate that customers are getting more for their money, with average spend among the pay-monthly subscription types we have looked at having fallen in real terms over the period under consideration, despite customers buying and using significantly more mobile data. This is consistent with the analysis of trends in the prices of services we set out earlier in this document, where the price of basket of services based on average use has been falling year on year, despite average data use increasingly markedly.

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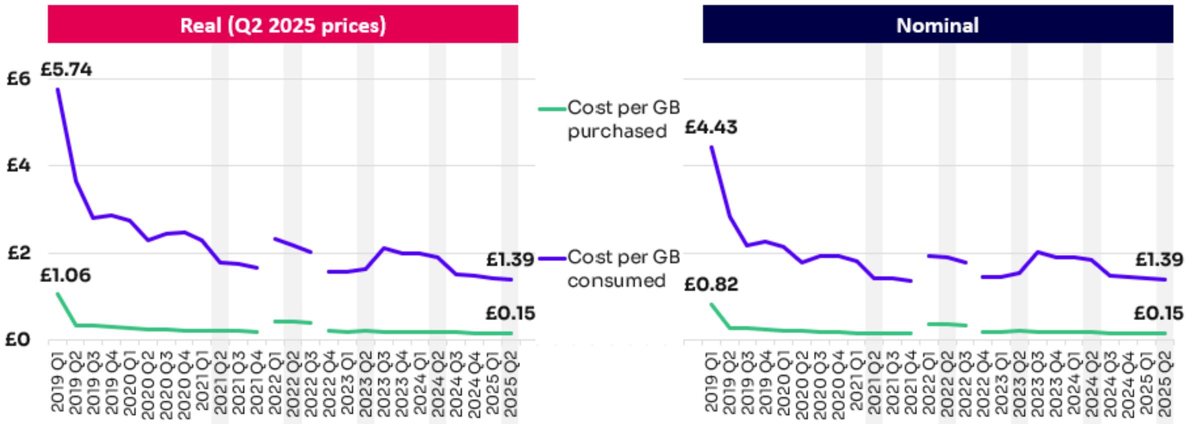
[47] Originally published in Monitoring Consumer Outcomes in the Mobile Sector (Figure 13).
[48] As noted in the chart, 'unlimited' allowances purchased are modelled as offering a fixed amount of data equal to 500 GB.
[49] Spend per GB may be overstated, as our data does not include all of the smaller mobile providers, which may offer cheaper contracts without in-contract price rises.

Figure 44: Average monthly spend per GB purchased and consumed: Q1 2019 to Q2 2025[50]



Source: Ofcom, based on mobile providers' customer-level data.
Notes: Based on pay-monthly SIM-only contracts; data collected in different tranches (Q1 2019 to Q4 2021; Q1 2022 to Q2 2023; Q3 2023 to Q2 2024; and Q3 2024 to Q2 2025); data for the period Q1 2019 to Q2 2023 exclude some providers (iD Mobile, O2, Talkmobile and Vodafone: entire period; Sky and Three: some months only) with incomplete data in the period; breaks in series due to one or more providers submitting non-reconcilable data across tranches or incomplete data; "unlimited" allowances purchased are modelled as offering a fixed amount of data equal to 500 GB; grey bars indicate Q2 of each year from 2021 onwards, when in-contract price rises were typically implemented; real-terms figures are adjusted for CPI (Q2 2025 prices).

Average monthly spend after controlling for tariff characteristics

Methodology[51]

One difficulty when using mobile spend data to understand trends in prices is that tariff characteristics such as the inclusive data allowance can change over time. For example, consumers may choose to switch to a more expensive tariff because it includes a larger data allowance. Therefore, simply tracking average monthly spend over time may not adequately reflect changes in other tariff characteristics and the value consumers get from their service.

One way in which we try to overcome this is to use regression analysis to look at average monthly spend. Regression analysis breaks down monthly spend into the value attributed to different tariff features (i.e., their observable characteristics) at any given point, and allows us to track spend over time, taking into account changing tariff characteristics.[52]

The analysis in this section – which updates what we included in the Monitoring Consumer Outcomes in the Mobile Sector report – focuses on pay-monthly SIM-only contracts. This makes the comparison of consumer spend on different mobile tariffs more straightforward, as it removes

[50] A version of this chart was originally published in the Monitoring Consumer Outcomes in the Mobile Sector report (Figure 14).
[51] For a more detailed overview of the methodology, see the annex in the Monitoring Consumer Outcomes in the Mobile Sector report (p. 38).
[52] As noted in the Monitoring Consumer Outcomes in the Mobile Sector report, regression analysis cannot account for all tariff characteristics. Importantly, we cannot control for unobserved features, such as certain aspects of network quality or the model specifications of handsets purchased as part of combined airtime and handset contracts or split contracts. In addition, the exact regression specification also assumes certain types of relationships between tariff prices and their features. For example, we assume that the value attributed to mobile data is the same between different providers.

certain tariff characteristics (i.e., the type of handset) which cannot be easily captured by our data and model.[53]

Although regression analysis enables better like-for-like comparison of mobile tariffs over time, it has some limitations. For example, for various reasons (including data limitations), our analysis does not include factors which cannot be adequately captured in our model, such as improvements in network quality, and some tariff characteristics, (e.g., whether a contract includes additional benefits, such as zero-rated access to access social media). Better data may allow us to overcome these limitations in the future.

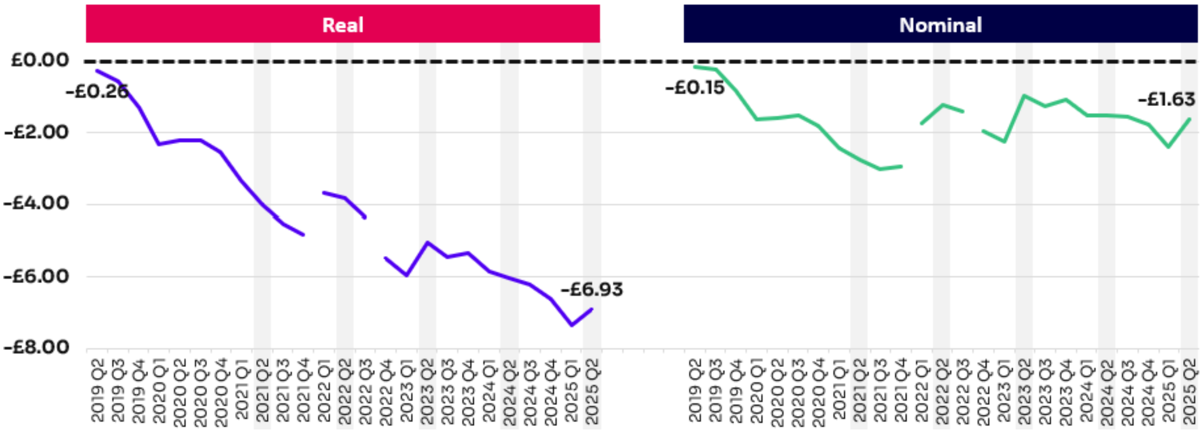
Even after controlling for tariff characteristics, average spend declined between Q1 2019 and Q2 2025

The results of the regression analysis suggest that, between Q1 2019 and Q2 2025, after controlling for tariff characteristics,[54] average spend declined in both real and nominal terms. Notably, average spend fell sharply between Q1 2019 and Q4 2021, with consumer spend about £5 per month lower in real terms (and about £3 per month lower in nominal terms) at the end of this period.

Spend then increased in early 2022 and 2023, during a period of high inflation, after which it declined through late 2023 and during 2024, before increasing in Q2 2025 (which is typically the quarter when in-contract price rises are applied to some customers' bills). The chart also shows that consumer spend, controlling for tariff characteristics, was similar in Q2 2025 and Q1 2022 in nominal terms (and lower in Q2 2025 than in Q1 2022 in real terms), indicating that the period of high inflation did not ultimately lead to a materially higher average consumer spend.

When compared to average spend in Q1 2019, spend in Q2 2025 was just under £7 per month lower in real terms for a given set of tariff characteristics, and about £1.60 per month lower in nominal terms. In general, our analysis of customer-level data shows that consumers are paying less for a given tariff; or getting more value (e.g. larger data allowances or extra benefits) for a given level of spend.

Figure 45: Change in average SIM-only pay-monthly spend after controlling for tariff characteristics, relative to Q1 2019:[55] Q2 2019 to Q2 2025



[53] As a robustness test, we also carried out the analysis for all pay-monthly contracts, obtaining qualitatively similar results to those for pay-monthly SIM-only contracts.
[54] In addition to quarterly time dummies, our regressions include individual time dummies for each mobile operator, length of the minimum contract period and size of the data allowance included in the contract (including specific dummies for unlimited allowances).
[55] Originally published in the Monitoring Consumer Outcomes in the Mobile Sector report (Figure 15).

Source: Ofcom, based on mobile providers' customer-level data.
Notes: Based on pay-monthly SIM-only contracts; data collected in different tranches (Q1 2019 to Q4 2021; Q1 2022 to Q2 2023; Q3 2023 to Q2 2024; and Q3 2024 to Q2 2025); data for the period Q1 2019 to Q2 2023 exclude some providers (Sky, Three and Vodafone) in some months in the period due to incomplete data; breaks in series due to one or more providers submitting non-reconcilable data across tranches or incomplete data; coefficients are estimated from a regression of average monthly spend on tariff characteristics and time fixed effects; grey bars indicate Q2 of each year from 2021 onwards, when in-contract price rises were typically implemented; real-terms figures are adjusted for CPI (Q2 2025 prices).

Pay-monthly mobile users may be able to save money by switching to a tariff which better matches their data use

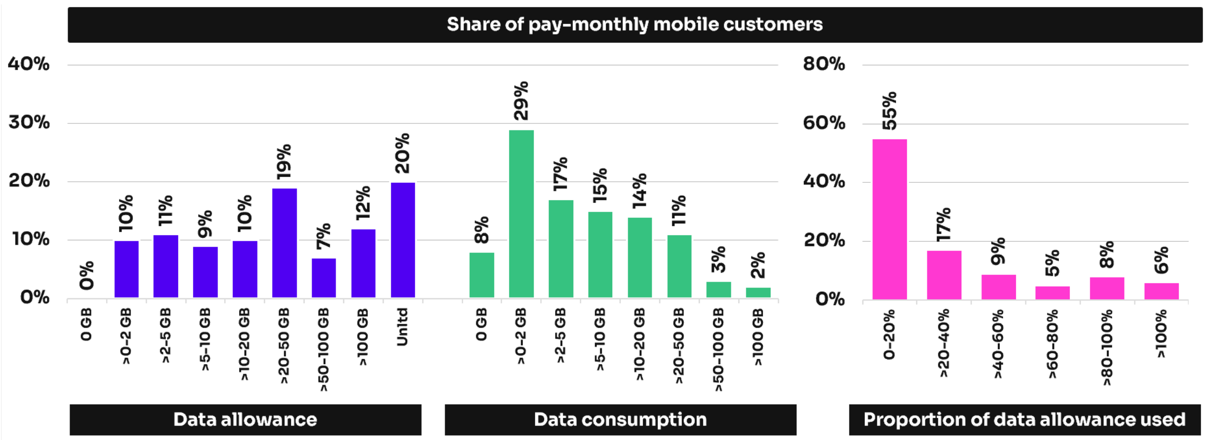
Customer-level data collected from mobile providers can also help us understand how people buy and use mobile services. By analysing this data we can see the distributions of pay-monthly mobile users' average monthly data allowance, average monthly data use, and the average proportion of the data allowance used.

This analysis shows that packages offering unlimited data were the most popular among pay-monthly mobile customers in Q2 2025, accounting for 20% of users, closely followed by those with >20-50 GB of inclusive data, taken by 19% of customers. Analysis of data consumption shows that average data use was low, with 29% of pay-monthly users consuming 2 GB of data or less per month, and a further 8% using no mobile data at all. Similarly, while over a third (39%) of pay-monthly customers took a service with over 50 GB of inclusive data per month, only 5% used that much data.

The fact that many pay-monthly mobile customers take a service with larger data allowances than they may require is also reflected in the distribution of the proportion of the data allowance that customers used. Most pay-monthly mobile customers (55%) used 20% or less of their monthly data allowance, with a further 17% using between >20% to 40% of what their tariff offered. At the top end of data allowance use, 8% of customers used >80% to 100% of their allowance, and 6% of customers exceeded their monthly data allowance.

This analysis suggests that many customers may be able to save money by choosing a tariff with an inclusive data allowance that better matches their needs. However, some customers prefer to have more data than they use to avoid unexpectedly high bills and, as UK mobile data prices are low, the savings from downgrading to a service with a smaller data allowance may be small.

Figure 46: Distribution of pay-monthly user average data allowance, average data consumption and proportion of data allowance (proportion of pay-monthly mobile customers): Q2 2025



Source: Ofcom / provider data.
Notes: Based on data provided by BT (inc. EE, Plusnet), iD Mobile, Sky Mobile, Tesco Mobile, Three (inc. SMARTY), O2 (inc. Virgin Mobile), giffgaff and Vodafone (inc. VOXI, Talkmobile).

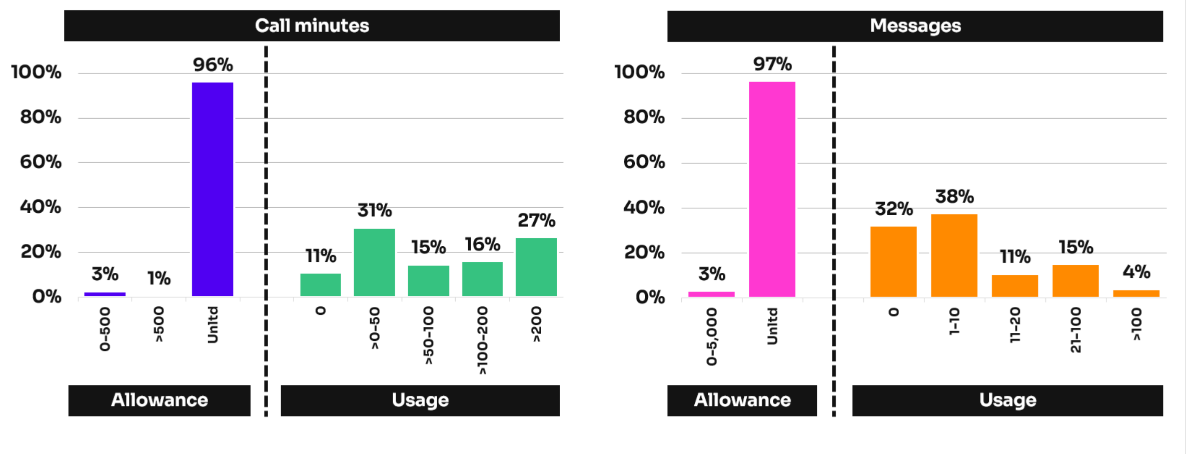
Most pay-monthly mobile users have a tariff with unlimited calls and SMS messages

The same customer-level data can be used to calculate distributions of average call and message allowances and usage for pay-monthly mobile customers. This analysis shows that 96% of pay-monthly customers had a package with unlimited inclusive calls in Q2 2025, while 97% took one with unlimited SMS messages.

Eleven per cent of pay-monthly users did not make an outgoing traditional mobile call in Q2 2025, while over half (57%) made 100 minutes of outgoing calls per month or less. SMS use was even lower, with 32% of users not sending an SMS message during the quarter, and 70% sending ten or fewer SMS or MMS messages per month.

The low use of these services, particularly SMS messages, is likely to be due to the popularity of app-based call and messaging services, such as WhatsApp, Apple iMessage and Facebook Messenger.

Figure 47: Distribution of average call and message allowances, and use among pay-monthly mobile customers (proportion of customers): Q2 2025



Source: Ofcom / provider data.
Notes: Based on data provided by BT (inc. EE, Plusnet), iD Mobile, Sky Mobile, Tesco Mobile, Three (inc. SMARTY), O2 (inc. Virgin Mobile), giffgaff and Vodafone (inc. VOXI, Talkmobile).

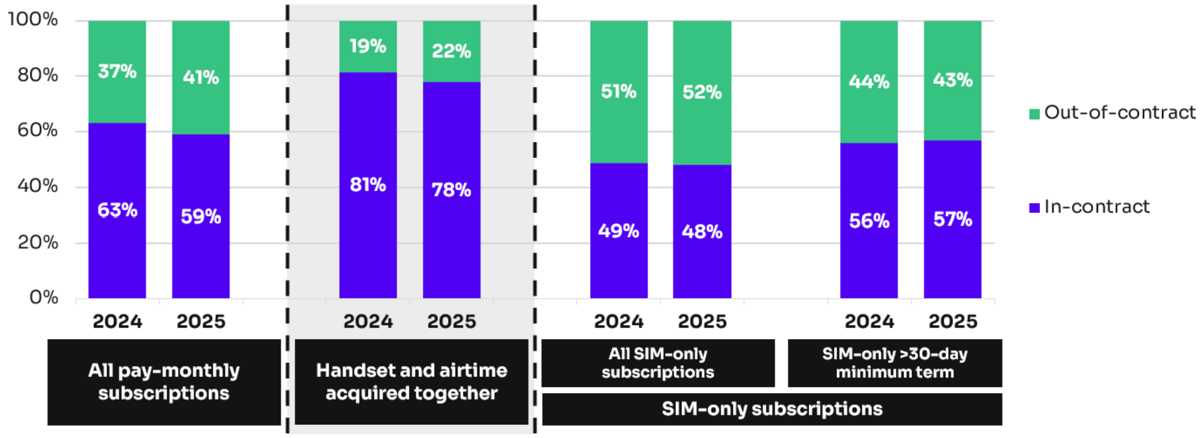
Over two in five pay-monthly mobile customers are out of contract

Analysis of customer-level data allows us to look at the proportion of pay-monthly mobile customers who are out of contract.

This shows that 41% of pay-monthly mobile users were out of contract in Q2 2025, an increase from 37% a year previously. This increase is likely to be linked to more customers taking SIM-only services with a <30-day minimum contractual period (either on their own or as the airtime element of a split handset and airtime contract) as these subscriptions are classed as always being out-of-contract. Pay-monthly customers who acquired a handset from their mobile provider alongside an airtime contract were more likely than average to be within their minimum contractual period: 78% of these customers were in contract, 19pp more than the figure across all pay-monthly customers. Among

SIM-only customers with an MCP longer than 30 days, 43% of subscriptions were out of contract, down 1pp year on year.

Figure 48: Proportion of pay-monthly mobile customers, by contract type and status: Q2 2024 and Q2 2025



Source: Ofcom / provider data.
Notes: Based on data provided by BT (inc. EE), iD Mobile, Sky Mobile, SMARTY, TalkTalk, Tesco Mobile, Three, O2 and Vodafone.

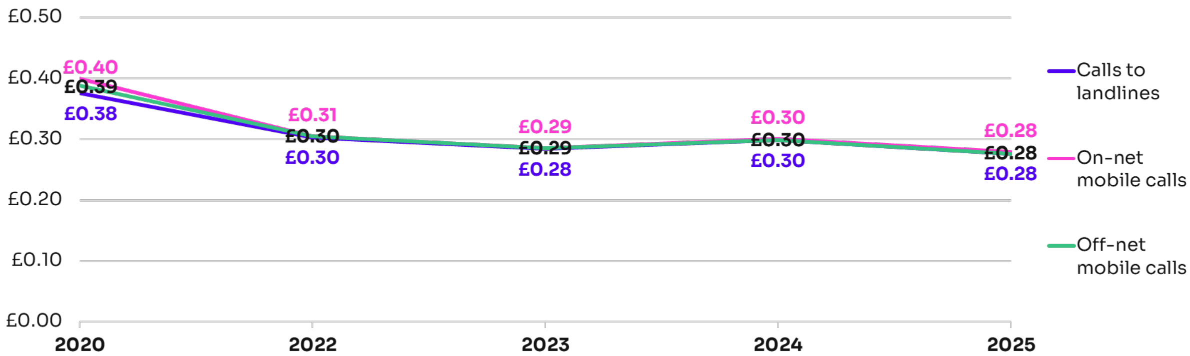
Out-of-bundle mobile call charges fell slightly year on year…

Analysis earlier in this report shows that 96% of pay-monthly mobile customers took a tariff with unlimited call minutes in June 2025, meaning that most mobile-originated calls to UK landline and mobile numbers will not be subject to any charges. Where these calls are made outside a tariff's inclusive call allowance, they will be subject to 'out-of-bundle' charges.

The average per minute out-of-bundle call charges for all three of the call types we looked at decreased by 7% in real terms (and 4% in nominal terms) in the year to July 2025. This was broadly consistent with the existing trend, when there were slight fluctuations over the period.

Customers without unlimited call minutes to UK landlines and mobiles can protect themselves from unexpectedly high charges from exceeding their call allowances by setting a spending cap with their provider. Since 2018, all mobile providers are required to allow any new customers, or existing customers renewing or extending their contract, to set a cap to help manage and limit bill costs.

Figure 49: Average out-of-bundle call charges for calls from mobile phones, in real terms (£/minute): 2020 to 2025



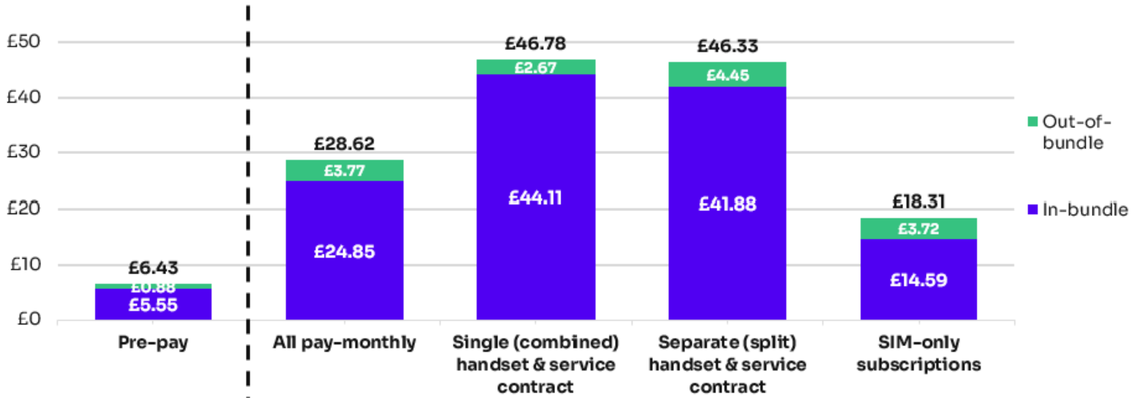
Source: Ofcom / OECD.
Notes: Excludes tariffs for which out-of-bundle call charges are not relevant; includes pre-pay and pay-monthly tariffs; based on tariffs offered by BT (incl. EE and Plusnet), giffgaff, iD Mobile, Lebara, Lyca Mobile, Sky Mobile, Tesco Mobile, Three, VMO2 (incl. O2, and Virgin Mobile until 2023) and Vodafone; includes VAT; data relates to July in each year except 2020, when it relates to October; on-net calls are made between customers on the same network, while off-net calls are made between different mobile networks; adjusted for CPI (July 2025 prices).

…and out-of-bundle mobile spend remains low as a proportion of total spend

Out-of-bundle spend is spend other than that related to a service's recurring monthly fee, for example if a customer makes a call outside their monthly call allowance or purchases a one-off roaming bolt-on.

Customer-level data collected from mobile providers suggest that inclusive allowances cater for most customer requirements, with out-of-bundle spend accounting for a relatively small share of total mobile spend in Q2 2025, averaging £2.81 per month (13% of total spend) across all subscription types. Average out-of-bundle spend for pre-pay mobiles was £0.88 per month in Q2 2025, accounting for 14% of average monthly spend, while average out-of-bundle spend across all pay-monthly subscriptions was £3.77 per month (13% of total spend).

Figure 50: Average monthly in-bundle and out-of-bundle spend, by subscription type: Q2 2025



Source: Ofcom / provider data.
Notes: Based on data provided by BT (inc. EE), iD Mobile, Sky Mobile, SMARTY, TalkTalk, Tesco Mobile, Three, O2 and Vodafone.

Using a mobile service abroad

International roaming charges vary by destination

Since the UK left the EU, EU 'roam like at home' rules (which enable mobile users from member states to roam in the EU without incurring additional charges) no longer apply to UK mobile users. While some providers, such as O2, Tesco Mobile, giffgaff, and iD Mobile, have not reintroduced EU roaming charges, others have, although whether a customer must pay for EU roaming will depend on their tariff.

The table below shows the major mobile providers' charges for customers roaming in the EU and US. Although a few providers charge for EU roaming on a per-unit basis (e.g. per MB data/call minute/SMS message), most charge for roaming in one of two other ways, which are more cost-effective for customers with more than basic use when roaming: roaming passes (which typically last for a set number of days) or roaming bundles with a set data allowance.

Charges for roaming outside the EU show greater variation between providers than those in the EU and are determined by the country or region where the customer uses their phone. Many providers also limit the use of UK data allowances when abroad through 'fair use' policies.

In October 2024, new rules were introduced requiring mobile providers to alert their customers when they begin roaming and if they are inadvertently roaming (for example, customers in Northern Ireland inadvertently roaming onto a Republic of Ireland network). Providers must also have measures in place to enable customers to reduce or limit spending on roaming while in the UK, and clearly inform customers of any fair use or time limits that apply when roaming, in addition to their other obligations.

Figure 51: Major providers' new contract EU and US roaming charges: August/September 2025

Provider	Charge to unlock allowance for use in the EU	Charge to unlock allowance for use in the US
EE	**Pay-monthly:** £2.59/day. 7-day EU Zone Pass £15.00/week. 12-day EU Zone Pass £21.50/ 12 days. (50GB per billing month fair use). **Pre-pay:** £2.50 for 24hrs, £10/week.	**Pay-monthly:** £5/day. 7-day Zone 1 Pass £25/week. (50GB per billing month fair use). **Pre-pay:** Data roaming bundles must be purchased e.g. 50MB for £5.22 (valid 1 day).
O2	No charge for **Pay-monthly** and **pre-pay** plans. (25GB per month fair use).	**Pay-monthly:** £7/day. Data roaming bundles £6 for 1GB; £13 for 3GB; £18 for 5GB. **Pre-pay:** £7.20/MB
Vodafone	**Pay-monthly:** £2.57/day. European Roaming Pass £15 for 8 days or £20 for 15 days. (25GB per month fair use). **Pre-pay:** Roam Extras 8-day passes - £4 for 200 SMS; £5 for 100 mins; £9 for 3GB data; £12 for 3GB, 100 mins & 200 SMS.	**Pay-monthly:** £7.86/day. (25GB per month fair use). **Pre-pay:** 11p/MB Roam Extras 8-day pass - £17 for 2GB, 100 mins & 100 SMS or £12 for 2GB only; 15-day pass - £27 for 4GB, 200 minutes, 200 texts
Three	**Pay-monthly:** Go Roam in Europe Passes: £2/day, £5 for 3 days, £12/week, £24 for 14 days. (12GB/month fair use). **Pre-pay:** No charge but the amount of roaming data available is dependent on the tariff purchased – 6GB for £10; 12GB for £15; 18GB for £20; 24GB for £25. Data passport - £5/day unlimited data (selected countries only, e.g. Spain, France).	**Pay-monthly:** £5/day. Go Roam Around The World Passes: £12.50 for 3 days, £30/week, £60 for 14 days. (12GB/month fair use). **Pre-pay:** No charge but the amount of roaming data available is dependent on the tariff purchased – 6GB for £10; 12GB for £15; 18GB for £20; 24GB for £25. Same as EU roaming.
Sky	**Pay-monthly:** Roaming Passport Plus £2/day. (25GB per month fair use).	**Pay-monthly:** Roaming Passport Plus £2/day. (25GB per month fair use).
Tesco Mobile	No charge for **Pay-monthly** and **pre-pay** plans.	**Pay-monthly:** £5/MB (automatically set up £40/month cap which can be adjusted). **Pre-pay:** £5/MB

Provider	Charge to unlock allowance for use in the EU	Charge to unlock allowance for use in the US
[giffgaff](#)	**Pay-monthly:** Bundles can be used for EU roaming. (5GB per month fair use). **Pre-pay:** Bundles can be used for EU roaming. (5GB per month fair use).	**Pay-monthly:** 20p/MB. **Pre-pay:** Possible to buy travel data add-ons, but access to prices requires having an account.

Source: Ofcom / Pure Pricing's Monthly Broadband Pricing Tracker report, September 2025 / provider websites. Notes: These prices are for customers whose tariff does not include roaming to the destination/s in question; for EE customers, EU roaming is included for Essentials Plus and All Rounder plans and roaming in the US is additionally included for Full Works plans; for Vodafone customers, EU roaming is included for Euro Roam plans and US Roaming is included for Global Roam plans; for O2 customers, US roaming included with Plus and Ultimate plans; for Three customers, US roaming included with Complete plans.

The cost-effectiveness of travel eSIMs depends on trip destination, duration, usage and provider

An embedded SIM (eSIM) is a programmable SIM that is digitally embedded into a device, and can work alongside, or remove the need for, a physical SIM card. With eSIMs, customers can change providers and contracts quickly, either through their smartphone's settings or by using a mobile app.

As smartphones increasingly support eSIMs, travel eSIMs aimed at enabling users to reduce the cost of roaming abroad have become more widely available and are offered by a range of providers including travel companies, financial institutions, telecoms providers, and specialist online providers.

Travel eSIMs often only provide data allowances (not traditional calls and messaging) and can enable users to save money by avoiding their domestic mobile provider's roaming charges when travelling abroad. Specialist travel eSIM providers sometimes offer discounts, promoted pricing, and travel-related benefits (such as enhanced security features, discounted lounge access and referral bonuses) to attract users.

We have compared the average cost of eSIMs from selected online travel eSIM providers (including any available discounts) with the roaming charges of UK mobile network operators' main brands over a 10-day trip. The comparison assumes 10 GB of data use (1 GB per day) and we have looked at the cost of the trip for pay-monthly customers whose tariffs do not include roaming in the destination country or countries, and whose available UK inclusive data allowance is greater than the 10 GB of usage required during the trip. The analysis focuses on popular EU travel destinations for UK residents (Spain, France, Italy, Portugal, and Greece) and the US.[56]

It should be noted that our analysis only covers the stated trip length, destinations and data usage, and as these determine the overall cost of roaming, our findings therefore relate only to these limited trip options. Additionally, we have only compared the financial cost of these trips using mobile operator and travel eSIM roaming options, and our analysis does not take account of any increased effort (such as account set-up, billing, and phone configuration) that using a travel eSIM service may require. For customers with providers which do not impose roaming fees to certain destinations, or whose plans include roaming in them, travel eSIMs are unlikely to offer savings.

Our analysis found that the average cost of a travel eSIM for the EU destinations we looked at for 10 GB of data use over ten days was £19.06, although prices varied by destination. This was 2% lower

[56] Travel trends - Office for National Statistics.

than the £19.50 average for the same trip using the cheapest pay-monthly options offered by the three UK MNO's main brands that charge for EU roaming.

While one of the MNO brands' lowest roaming prices for the trip were cheaper than the eSIM average, two were more expensive. The MNO brands' lowest roaming options ranged from £17.00 to £21.50, suggesting that even where it is more cost-effective for a pay-monthly UK mobile user to use a travel eSIM when they are in the EU, the savings may be limited.

For 10 GB of data use across a ten-day holiday to the US, travel eSIMs were significantly more cost-effective for customers of the UK MNOs' four main brands, according to our analysis. The average travel eSIM cost for this trip was £21.83, whereas roaming charges from UK mobile providers' main brands were much higher, ranging from £36.00 to £78.60 (and averaging £49.28), highlighting a substantial price gap compared to the average eSIM cost when travelling in the US.

For providers which only offer per-unit data charges when overseas, the cost of roaming abroad can be extremely high if any roaming cap is removed, although it is more likely that the customer would reach this cap or run out of credit early in their trip.

Both eSIM and UK mobile providers may also impose limits on roaming data speeds or use, which will be detailed in their terms and conditions. Given usage limitations and varying UK provider roaming charges, customers should always review their mobile plan's roaming policies to determine whether a travel eSIM or roaming option offers better value and meets their connectivity needs before travelling.

Figure 52: Comparison of major providers' roaming add-on charges for ten-day trips to the EU and US using 10 GB of data, and the equivalent cost using a travel eSIM cost: August/September 2025

	Range of costs using UK MNO main brands' cheapest roaming options	Average price across selected travel eSIM providers' cheapest options
Total cost of 1 GB of roaming data per day over a ten-day trip to EU destinations	£17.00 to £21.50 (average £19.50)	£13.39 to £30.00 (average £19.06)
Total cost of 1 GB of roaming data per day over a ten-day trip to the US	£36.00 to £78.60 (average £49.28)	£14.99 to £30.00 (average £21.99)

Source: Ofcom / operator websites / Pure Pricing's UK Monthly Mobile Pricing report September 2025.
Note: EU travel destination charges relate to Spain, France, Italy, Portugal, and Greece; UK mobile provider roaming costs for EU travel destinations include EE, Vodafone, and Three (O2 offers free EU roaming); UK mobile provider roaming costs for the US include EE, O2, Vodafone, and Three; eSIM average costs were calculated using the cheapest options, including tariffs with unlimited data allowances, offered by Uswitch, Airalo, Maya Mobile, Saily, Holafly and Jetpac.

Pricing of pay TV and SVoD services

Traditional pay TV and subscription video-on-demand (SVoD)
Traditional pay TV services are subscription-based offerings that provide paid access – usually via long-term contracts – to content packages of linear TV channels and often video-on-demand programming/services as well. Services are typically offered over satellite, cable, or IP networks. UK providers include Sky, Virgin Media, and EE TV. **Subscription video-on-demand (SVoD) services** offer paid streaming access – usually on a rolling monthly contract basis – to a library of on-demand programming, and in some cases also linear streams, including some live events. SVoD services are delivered over-the-top (OTT) using the open internet and the user's broadband connection. Popular services include Netflix, Amazon Prime Video, and Disney+.

Pay TV services and add-on pricing

Average price of pay TV in triple play bundles

People who want to be able to watch channels and content beyond what it available on free-to-air platforms can subscribe to a pay TV service.

Barb's Establishment Survey shows that 34% of households subscribed to a traditional pay TV service in Q3 2025.[57] Additionally, our analysis of data collected from providers for use in this report suggests that three-quarters of pay TV households bought their service as part of a bundle in June 2025, with about two-thirds of those buying it in a triple-play bundle with fixed broadband and fixed voice.

We have estimated the cost of purchasing a TV service as part of a triple-play (fixed broadband, fixed voice and TV) bundle using data from Pure Pricing's Monthly Broadband Pricing Tracker reports. To do this, we take the price of a triple-play bundle and subtract the price of a similar dual-play (fixed broadband and fixed voice) package from it.

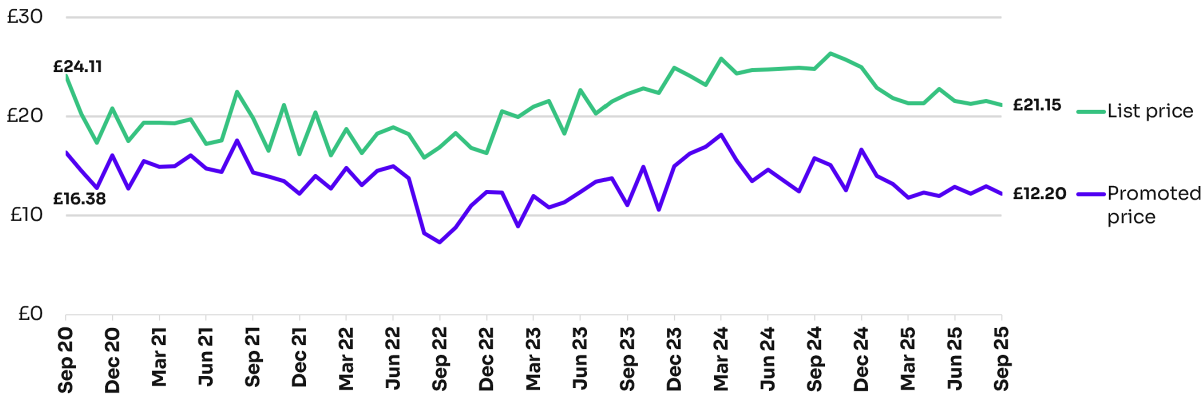
It should be noted that that analysis below is different from that included in previous reports as: (i) the method of calculation differs (in that it matches each triple-play bundle to similar dual-play services, rather than vice versa, and a match of the broadband technology is now also required); and (ii) because it includes additional providers' services.

Our analysis shows that the estimated average list price of a pay TV service when purchased as part of a bundle fell by £3.68 per month (15%) to £21.15 in real terms in the year to September 2025, while the average price for new customers taking promoted offers fell by £3.58 per month (23%) to

[57] Barb Establishment Survey Q3 2025. Pay TV includes traditional paid-for TV services such as cable or satellite and IPTV services, but excludes SVoD services.

£12.20 over the same period. These falls in price followed 15% increases in both average list and promoted prices between September 2023 and September 2024.

Figure 53: Estimated average monthly price of pay TV purchased as part of a triple-play bundle, in real terms: September 2020 to September 2025



Source: Ofcom, using data from Pure Pricing Monthly Broadband Pricing Tracker reports.
Notes: Average pay TV subscription fee component of triple-play bundle; calculated as the difference between equivalent triple-play and dual-play tariffs for the following providers: Community Fibre, BT, EE, Sky, TalkTalk, Virgin Media and Vodafone; adjusted for CPI (September 2025 prices).

A mixed picture for pay TV premium content add-on prices

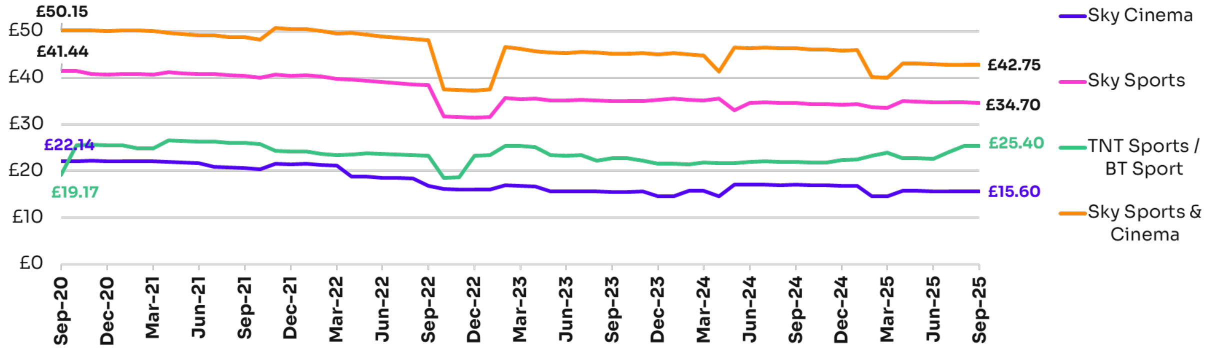
We have analysed the average list prices of premium pay TV content offered by BT, NOW, Sky, TalkTalk, and Virgin Media when purchased as an add-on to their basic pay TV packages.

In doing so, we found that the average monthly list price for Sky Cinema and Sky Cinema & Sports decreased in the year to September 2025, both falling by 8% in real terms to £15.60 and £42.75 respectively. However, the average monthly prices for Sky Sports and TNT Sports both increased in real terms year on year, with Sky Sports increasing by 8 pence per month (less than 1%) and TNT Sports having a larger average increase of £3.39 per month (15%).

There was a dip in average list prices in February/March 2025 as one provider did not list premium pay TV add-on prices in these months, and was excluded from the analysis. There were also notable falls in the average price of premium pay TV add-ons in October 2022 and April/May 2024, due to one pay TV service offering significantly lower list prices to customers purchasing its premium content.

Promoted offers on premium pay TV add-ons are often available to consumers; with average discounts in September ranging from £1.52 to £2.72 per month, representing 5-10% of average list prices.

Figure 54: Average monthly list prices of pay TV premium add-ons in real terms: September 2020 to September 2025



Source: Ofcom / Pure Pricing's Monthly Broadband Pricing Tracker reports.
Notes: Figures are derived by calculating the average price of adding the required content to the basic pay TV service from those providers that offer relevant add-ons; includes the following pay TV services: BT, NOW, Sky TV (including Sky Stream from May 2023), TalkTalk, and Virgin Media (including Flex from Virgin Media from November 2021); TNT Sports replaced BT Sport in July 2023; adjusted for CPI (September 2025 prices).

Streaming services pricing

Many SVoD services offer cheaper ad-supported options

According to Barb's Establishment Survey, the proportion of UK households receiving any SVoD service was 69% in Q3 2025.[58] Since Q4 2021, the proportion of households using any SVoD has fluctuated slightly each quarter, mostly ranging from 66% to 69% each quarter - with a slightly bigger dip to 65% in Q4 2023. The average number of SVoD subscriptions per SVoD household has remained stable since Q1 2024 at just under two and a half per household.

Facing a slowdown in subscriber growth, SVoD providers have shifted their focus onto other ways of driving revenue growth, for example through price increases, changing their product offering and introducing 'ad-supported' subscription plans. Ad-supported plans offer a lower price in exchange for showing advertisements. They enable price-sensitive consumers to access content at a reduced cost, while generating additional revenue through advertising.

While some streaming services have offered ad-supported tiers for several years, others have only recently followed suit. Paramount+ launched a £4.99 ad-supported subscription plan in November 2024, offering a cheaper alternative to its £7.99 per month 'Standard' subscription plan (which still includes adverts in its live TV content). Netflix raised the price of its ad-supported plan by £1 per month in 2025 to £5.99, while other providers kept their pricing unchanged.

Several providers have changed their offering in 2025 to target more subscribers: Amazon launched Prime Video for students at half the standard price while Discovery+ restructured its subscription plans to offer a standalone TNT Sports for £3 per month less than its former TNT Sports & Entertainment (which was £3 per month more expensive than the 'Premium' plan it replaced). Additionally SVoD platforms may offer access to other services as an add-on - for example, Amazon allows its Prime Video channel users to purchase subscriptions to other platforms such as Apple TV+ ITVX Premium and Paramount+.

[58] Barb Establishment Survey Q3 2025. Includes households with one or more free or paid-for SVoD subscriptions.

To increase their subscriber bases and reduce subscriber churn, SVoD providers are also increasingly dependent on offering subscriptions through other communications providers. For example, Netflix is offered via Sky and Virgin Media, bundled with their pay TV services, while Disney+ is offered with some of O2's mobile packages. Bundling of these services may be attractive to consumers as it further simplifies access to these services and billing arrangements.

Figure 55: Selected video-on-demand pricing in UK: September 2025

Provider	Pricing	Ad-supported plan
Amazon Prime Video 30-day free trial	**Amazon Prime Video:** £8.99pm / £95pa (inc. express shipping on some items bought on Amazon.co.uk & other benefits). **Amazon Prime Video for students:** £4.49pm (inc. express shipping on some items bought on Amazon.co.uk & other benefits). **Prime Video only:** £5.99pm without shipping or other benefits);	Prime Video became ad-supported as standard in Feb 2024; Content can be streamed ad-free at an additional cost of £2.99pm.
Apple TV+ 7-day free trial (3 months free with Apple device)	£9.99pm / £89pa and bundled in Apple One (which includes various plans)	n/a
Channel 4+ 7-day free trial	Ad-free on-demand content (Channel 4+) can be streamed for £3.99pm / £39.99pa.	On-demand content can be streamed for free with ads; ads are featured during any streaming of live content.
Discovery+ 7-day free trial	**Entertainment**: £3.99pm **TNT Sports:** £30.99pm **TNT Sports & Entertainment:** £33.99pm	All plans feature a small number of ads when on-demand content is streamed.
Disney+	**Standard with ads**: £4.99pm**.** **Standard**: £8.99pm / £89.90pa. **Premium**: £12.99pm / £129.90 pa.	Ad-supported tier, Standard with ads, launched in Nov 2023, priced at £4.99pm.
ITVX Premium	Ad-free on-demand content and some content only available to ITVX Premium subscribers can be streamed for £5.99pm / £59.99pa.	On-demand content can be streamed for free with ads (some content is only available with an ITX Premium subscription); ads are featured during any streaming of live content.
Netflix	**Standard with ads:** £5.99pm **Standard:** £12.99pm **Premium:** £18.99pm	Ad-supported tier launched in Nov 2022, currently priced at £5.99pm
NOW 7-day Hayu free trial 7-day Boost / Ultra Boost free trial	**Entertainment**: £9.99pm **Cinema**: £9.99pm (**Sports**: £34.99pm. **Hayu:** £4.99pm	On-demand content is ad-free when **Boost** (£6pm) or **Ultra Boost** (£9pm) are purchased; All live content streamed is ad-supported.
Paramount+ 7-day free trial	**Basic (with ads):** £4.99pm. **Standard:** £7.99pm. **Premium:** £10.99pm.	Ad-supported tier launched in Nov 2024, priced at £4.99.

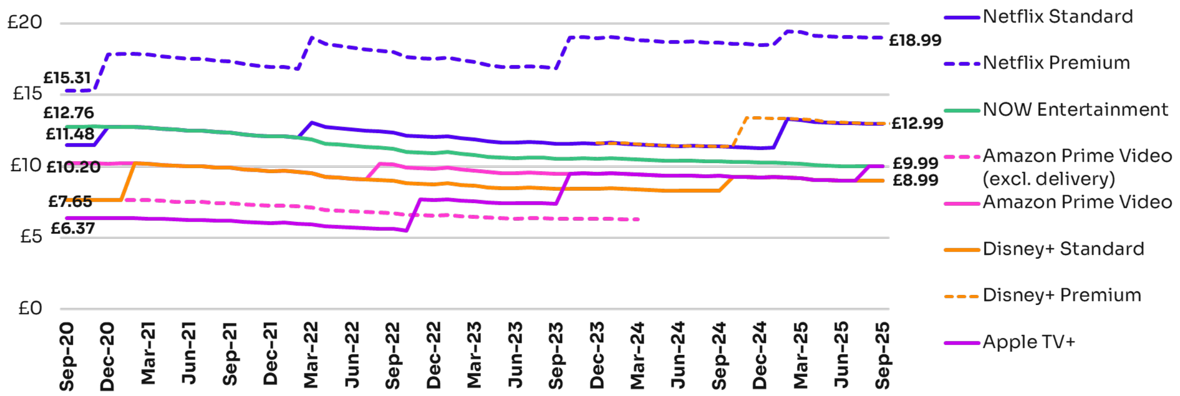
Provider	Pricing	Ad-supported plan
YouTube Premium 1-month free trial	**Premium Lite:** £7.99pm. **Individual:** £12.99pm. **Family:** £19.99pm.	Content can be accessed for free with ads. Premium Lite subscription offers most videos ad-free, but ads may appear on music content, Shorts, and when searching or browsing.

Source: Pure Pricing's Monthly Broadband Pricing Tracker reports; provider websites.
Note: Free trials are subject to eligibility requirements; there may be additional promoted discounts that are not listed above.

Some SVoD services increased their prices in 2025

We analysed the monthly list prices for selected UK SVoD services and found that all services in our analysis increased their prices in the year to September 2025 except for NOW Entertainment and Amazon Prime Video (whose monthly prices were unchanged year on year in nominal terms and fell in real terms). Netflix increased prices for its Standard and Premium services by £2 and £1 per month respectively. Disney+ Standard and Apple TV increased both increased their services by £1 per month in the year to September 2025, while the price of Disney+ Premium increased by £2 per month.

Figure 56: Monthly list pricing of SVoD services in real terms: September 2020 to September 2025



Source: Ofcom / Pure Pricing's Monthly Broadband Pricing reports.
Notes: Netflix also offers Standard with adverts (£5.99); NOW also offers Sports (£34.99), Cinema (£9.99) and Sky Sports Day Pass (£14.99 per day); Disney+ also offers Standard with ads (£4.99); from April 2024, Amazon also offers Amazon Prime for students (£4.49) and is no longer promoting Amazon Prime Video excluding delivery services; adjusted for CPI (September 2025 prices).

International comparisons

The UK was ranked third out of six comparator countries for communications service prices in 2025

As part of our programme of price monitoring work, we benchmark communications service prices in the UK against those in France, Germany, Italy, Spain, and the US. Annex 1 below sets out the methodology we use. This section of the report provides a summary of our findings regarding:

- standalone fixed broadband, fixed voice, and mobile phone prices;
- dual-play (fixed broadband and fixed voice) bundle prices; and
- triple-play (fixed broadband, fixed voice and pay TV) bundle prices.

We compare prices using two metrics based on the best price offered by the largest providers in each country for low, medium, and high users of the service/bundles above:

- lowest available price, which is the lowest price offered by any of the largest providers in a country; and
- weighted average price, which is calculated using the best prices available from the largest providers in a country, weighted by their market shares.

It should be noted that our analysis only includes tariffs offered by each country's largest providers of each service, meaning that it excludes tariffs offered by smaller, challenger providers, which may offer lower prices in order to gain market share, As these challenger providers will tend to be smaller, their omission will have a greater impact on our lowest available prices than on weighted average prices.

Across all the standalone services, bundles, and price metrics included in our analysis, the UK was ranked third overall among our six comparator countries in 2025, after France and Italy. Across all services, the UK was ranked third for both 'average' and 'lowest available' prices in 2025.

The UK's overall rank was unchanged since 2024. France had the lowest prices overall, and the US continued to have the highest prices.

Among the six countries included in our analysis, the UK had the lowest triple-play (fixed broadband fixed voice, and TV) bundle prices out of the four comparator countries offering these services, the second-lowest standalone mobile prices, the third-lowest overall standalone fixed broadband and standalone fixed voice prices, and was ranked fourth for dual-play (fixed broadband and fixed voice) bundles.

Figure 57: International comparison of overall, lowest available and weighted average standalone and bundled household usage prices: 2025 (ranked; 1 is cheapest)

		GBR	FRA	DEU	ITA	ESP	USA
All metrics and services	Overall rank	**3**	**1**	**5**	**2**	**4**	**6**
	Weighted average price rank	3	1	5	2	4	6
	Lowest available price rank	3	1	5	2	4	6
Standalone fixed voice	Overall rank	**3**	**4**	**6**	**2**	**1**	**5**
	Weighted average price rank	4	3	5	1	2	6
	Lowest available price rank	3	4	6	2	1	5
Fixed broadband	Overall rank	**3**	**2**	**6**	**1**	**4**	**5**
	Weighted average price rank	3	2	6	1	4	5
	Lowest available price rank	3	2	4=	1	4=	6
Standalone mobile phone	Overall rank	**2**	**1**	**3**	**4**	**5**	**6**
	Weighted average price rank	3	1	2	4	5	6
	Lowest available price rank	2	1	3	4	5	6
Dual-play bundles	Overall rank	**4**	**1**	**5=**	**2**	**3**	**5=**
	Weighted average price rank	4=	1	4=	2	3	6
	Lowest available price rank	5	1	6	2	3	4
Triple-play bundles	Overall rank	**1**	**3**	**2**	**n/a**	**n/a**	**4**
	Weighted average price rank	1	2=	2=	n/a	n/a	4
	Lowest available price rank	1=	3	1=	n/a	n/a	4

Source: Ofcom, using data provided by OECD.
Notes: Grey boxes denote the top-ranking country for each metric; the overall rank is calculated from the mean of the individual service and metric rank; Spain had no triple-play fixed broadband, fixed voice and pay TV bundle offers and Italy had no offers for triple-play bundles with premium films; we are therefore unable to rank these countries for triple-play bundles; data relates to August/September 2025.

Bundled services

The UK ranked fourth overall for dual-play fixed broadband and fixed voice bundle prices in 2025, up one place compared to 2024. Across the dual-play bundles included in our analysis, the UK was joint-fourth (with Germany) for weighted average prices in 2025 (again, up one place compared to 2024) and fifth for lowest available prices (unchanged year on year).

The UK was placed first overall for triple-play (fixed broadband, fixed voice and pay TV) bundles out of four countries (as there were no suitable offers in Italy and Spain), up three places compared to 2024. The UK ranked first for weighted average prices and joint-first (with Germany) for lowest available prices.

Fixed broadband services

The UK ranked third overall for fixed broadband prices in 2025, based on the lowest available and weighted average prices across the standard, superfast, and ultrafast broadband connections included in our analysis. This was down one place from second in 2024.

The UK came third across our three fixed broadband connections for both weighted average and lowest available prices. Compared to 2024, the UK's rank fell by one place for both lowest available prices and weighted average prices.

Across lowest available and weighted average prices, the UK's highest rank was for superfast broadband prices, where it was second (out of five) for these services compared to third (out of five) for standard broadband prices and fourth (out of six) for ultrafast broadband prices.

Fixed voice services

When factoring in both lowest available and weighted average prices, the UK had the third lowest standalone fixed voice prices among the six countries in our analysis in 2025, unchanged since 2024.

The UK ranked third for lowest available standalone fixed voice prices across the three connections used in our analysis, and fourth in terms of the weighted average prices for these connections. These ranks were reversed since 2024, when the UK was third for weighted average prices and fourth for lowest available prices.

Mobile phone services

The UK had the second-lowest standalone mobile prices across the three mobile connections used in our analysis in 2025 when factoring in both weighted average and lowest available prices. This rank was unchanged from 2024.

France had the lowest mobile prices in 2025, as was the case in 2024.

The UK was ranked second for lowest available standalone mobile phone prices in 2025 (unchanged from 2024) and third for weighted average prices (down one place year on year).

Affordability, debt and disconnections

Affordability of communications services

Ofcom has a duty to carry out, publish and take account of consumer research regarding the experiences of consumers of communications services. In discharging these duties, we regularly collect and publish market intelligence and consumer research on the affordability of communications services.

Over the last five years, we have published five reports on the affordability of communications services in which we have noted that significant numbers of consumers have faced affordability issues with accessing internet services, including fixed broadband and mobile broadband. Social tariffs (or 'targeted tariffs') play a role in supporting households on means-tested benefits, and Ofcom urges all providers to offer and promote social tariffs.

Many providers have responded positively to our calls, with around 85% of fixed broadband homes now able to access a social tariff (if they are on qualifying benefits) without switching provider or incurring an early termination charge. As noted below, take-up of social tariffs has continued to grow.

Our Communications Affordability Tracker monitors consumers' attitudes and behaviours regarding the affordability of communications services and has been running since June 2020. The latest results are published in an interactive form on the Ofcom website.

To understand the financial impact that the cost of communications services has on households, we asked consumers if they had taken any actions in response to affordability issues.[59] These actions included: making changes to a communications service (e.g. switched package or tariff); reducing spend elsewhere (such as on food or clothes);[60] cancelling a service; making changes to a payment method;[61] and missing a payment. In October 2025, around a quarter (24%) of households had undertaken affordability actions, equating to approximately 6.7 million (±700,000) UK households,[62] consistent with October 2024 (25%).

Our research shows that 7% of households with fixed broadband found it difficult to afford their service in October 2025, equating to around 1.6 million (±400,000) UK households. This is consistent with October 2024. Among fixed broadband households, in response to affordability issues, 5% said they had made changes to their fixed broadband service, 1% said they made changes to their payment method, and <1% had cancelled their fixed broadband service.

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[59] A household can experience multiple issues with the same service or the same issue with multiple services.
[60] These were the examples given to participants, but responses were not restricted to these. Participants could have reduced spend on other items, not just food and/or clothes.
[61] This might include using savings to pay the bill; using a credit card to pay the bill; taking an agreed payment break/deferral; using an overdraft to pay the bill; taking out a loan/borrowing money to pay the bill; or entering into a repayment plan agreement
[62] For an explanation of population estimates, see the methodology in Annex 1.

The households that were more likely to experience fixed broadband[63] affordability issues include those in a minority ethnic group (13%), and those in receipt of means-tested benefits (11%). Households receiving benefits are likely to qualify for social tariffs, which provide lower prices than commercial tariffs and are not subject to in-contract price rises.

Five per cent of households with a mobile phone found it difficult to afford their service, which equates to about 1.5 million (± 400,000) homes, in line with October 2024 (6%). Among households with a mobile phone, in response to affordability issues, 3% had made changes to their data allowance, 2% had made changes to their payment method, 2% had made changes to their inclusive minutes, 1% had missed a payment, and <1% had cancelled a payment.

According to Ofcom's 2025 Technology Tracker, 4% of respondents live in households that are 'mobile internet only' households, meaning they do not have a home fixed broadband connection and can access the internet only via mobile phone network data or a mobile broadband connection (e.g. a dongle/USB device).[64] Our research found that 5% of these households had taken affordability actions with their mobile service in October 2025, in line with October 2024 (4%), and remaining stable following a decrease from October 2023 (13%).[65]

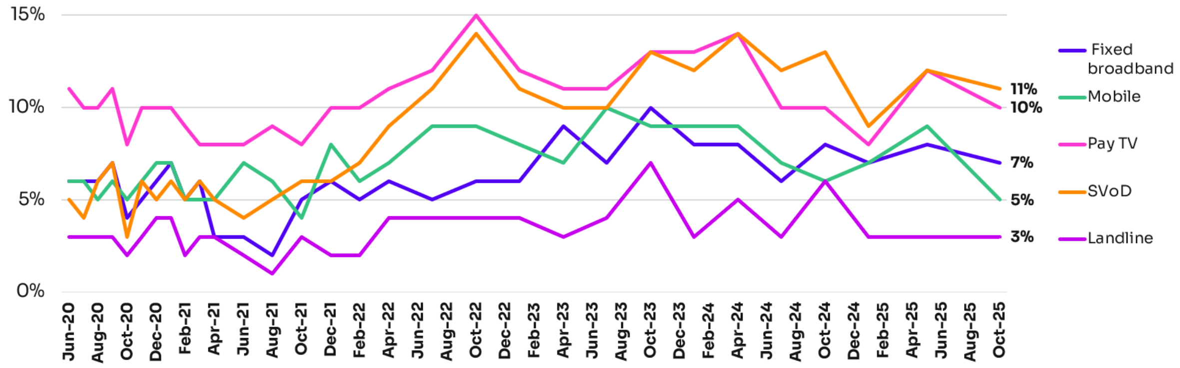
As in October 2024, households with pay TV and/or subscription video-on-demand (SVoD) services were the most likely to say they struggled to afford these services, at 10% and 11% respectively. This may be due to households prioritising spend on other communications services, as these two services also have the highest levels of cancellations (5% and 7% respectively). Our research also found that 83% of households which had cancelled an SVoD service due to affordability issues in the past month had retained access to another SVoD service.[66]

In October 2025, 3% of households said they had a landline affordability issue. Of those with a fixed voice service, in response to affordability issues, 2% had made changes to their service, and <1% had made changes to their payment method or cancelled their service.

As shown below, although affordability issues with communications have eased from the peak levels seen during the pandemic, many households continue to take steps to manage costs, indicating that affordability challenges remain.

[63] The base of this calculation is households who own or previously owned (i.e. cancelled in the last month) a fixed broadband service.
[64] Ofcom's Technology Tracker, June 2025.
[65] Ofcom's Communications Affordability Tracker 2025.
[66] This is indicative only as low base (n=50).

Figure 58: Experience of communications affordability issues, by service: June 2020 to October 2025[67]



Source: Ofcom Communications Affordability Tracker.
Base: UK decision makers aged 18+.

Support for vulnerable and low-income consumers

Overview of social tariffs

Over the past few years, Ofcom has called on communications providers to offer and promote broadband social tariffs. Social tariffs are available to those on qualifying benefits and can help ensure that fixed broadband and mobile services remain affordable for customers on low or no income who struggle to pay their bills.

Ofcom does not have the power to introduce regulated social tariffs without being directed to do so by the UK Government. However, providers have responded to our calls to offer social tariffs on a voluntary basis and the number of providers offering social tariffs to customers has increased, from three in 2020 to more than 30 in February 2026.

Social tariffs are offered at a discounted price relative to comparable commercial tariffs. They are priced at between £12.50 and £24 per month for fixed broadband (see below for examples) and £10 to £12 per month for mobile. Social tariffs can provide consumers with significant savings on their fixed broadband bills. However, we note that some providers have recently increased the price of their social tariffs.[68]

Almost all fixed broadband social tariffs are available to consumers who are receiving means-tested benefits such as Universal Credit and Pension Credit. We also expect social tariffs to offer additional protections to consumers, such as no in-contract price rises, the ability to switch to, or off, their provider's own social tariff with no early termination charges, and minimal set-up costs.

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[67] Respondents were asked whether, in the past month, they had taken any affordability-related action because they could no longer afford their service. Affordability actions included: cancelling a service, making changes to a service, reducing spend elsewhere, missing a payment, or changing a payment method. The figures shown represent the proportion of users of each service who reported taking at least one of these actions.

[68] BT has adjusted its social tariff pricing, increasing each by £1. Its monthly product prices are: 'BT Home Essentials No Income' (£16), 'BT Home Essentials Unlimited 36 Mbit/s' (£21) and 'BT Home Essentials 67 Mbit/s '(£24). Highland Broadband has updated its social tariff from £19.99 to £23.99 per month, while Grayshott Gigabit, now trading as Gigabit IQ, has updated its social tariff from £19.99 to £22.99 per month. Gigabit IQ's new offer no longer includes a set-up charge.

Figure 59: Selected social tariff broadband pricing compared with similar commercially available broadband packages from the same provider:[69] December 2025

Social tariff Package	Social tariff advertised speed	Social tariff monthly price	Commercial tariff advertised speed	Commercial tariff monthly promoted price	Commercial tariff monthly price after 24 months
BT Home Essentials No Income***	36 Mbit/s	£16.00	36 Mbit/s	£27.99	£32.99
BT Home Essentials Unlimited 36 Mbit/s	36 Mbit/s	£21.00	36 Mbit/s	£27.99	£32.99
BT Home Essentials Unlimited 67 Mbit/s	67 Mbit/s	£24.00	67/74 Mbit/s	£28.99	£33.99
Community Fibre Essential	35 Mbit/s	£12.50	100 Mbit/s	£19.00	£23.00
Hyperoptic Fair Fibre 50	50 Mbit/s	£15.00	50 Mbit/s	n/a	£30.00
Hyperoptic Fair Fibre 150	150 Mbit/s	£20.00	150 Mbit/s	£22.50	£25.00
KCOM Full Fibre Flex	30 Mbit/s	£14.99	100 Mbit/s	£37.99	£42.99
KCOM Full Fibre Flex +	50 Mbit/s	£19.99	100 Mbit/s	£37.99	£42.99
Sky Broadband Basics	36 Mbit/s	£20.00	61/75 Mbit/s	£27.00	£46.00
Virgin Media Essential Broadband	15 Mbit/s	£12.50	132 Mbit/s	£23.99	£68.00
Virgin Media Essential Broadband Plus	54 Mbit/s	£20.00	132 Mbit/s	£23.99	£68.00
Vodafone Fibre 2 Essentials	73 Mbit/s	£20.00	63 Mbit/s	£25.00	£30.00

Source: Ofcom, Pure Pricing Monthly Broadband Pricing Tracker reports.
Notes: Commercial tariff prices are based on a 24-month contract or a 24-month promoted period; the promoted commercial price for Hyperoptic's 150 Mbit/s package is structured as £19 for 4 months, £22 for 12 months and £25 for 8 month.[70]

Availability of social tariffs

Since our December 2024 Pricing Trends report, additional fixed broadband social tariffs have come onto the market, some with new providers, increasing availability and choice for consumers.

Hyperoptic now offers 500 Mbit/s and 1 Gbit/s 'Fair Fibre' social tariffs in addition to its existing 50 Mbit/s and 150 Mbit/s 'Fair Fibre' packages. FibreNest has launched a new 36 Mbit/s social tariff, while KCOM has launched a 50 Mbit/s' Flex+' tariff in addition to its existing 'Full Fibre Flex' social tariff. Lothian Broadband changed its business name to 'Highland Broadband' and extended its social

[69] We note that not all providers offer social tariffs with broadband speeds directly comparable to their standard commercial packages, with some social tariffs offering lower connection speeds.
[70] Since this information was collected in December 2025, Hyperoptic has reduced the monthly prices of its 'Fair Fibre 50' and 'Fair Fibre 150' social tariffs to £12 and £13 respectively, and launched additional 500 Mbit/s and 1 Gbit/s 'Fair Fibre' social tariffs.

tariff to many parts of rural Scotland, rather than just the Lothian region, improving availability. TalkTalk continues to be the only major fixed broadband provider that does not offer a social tariff.

All three MNOs offer a social tariff, although there are low-cost standard SIM-only and pre-pay deals available that in some cases may be cheaper than the social tariffs on offer. EE and Virgin Media O2 offer social tariffs directly. VodafoneThree offers social tariffs via the SMARTY and VOXI brands.

Take-up of social tariffs

Take-up of social tariffs has continued to grow and by June 2025 532,000 customers took a social tariff, a moderate year-on-year increase of 26,000 (5%).[71]

As shown below, BT had the most customers taking a fixed broadband social tariff in June 2025, accounting for 64% of all fixed broadband social tariff connections, followed by Sky (24%), Virgin Media O2 (6%), Vodafone (4%), and KCOM (2%).[72] These proportions are partly a reflection of the length of time for which different social tariffs have been available.[73] For most of the major fixed telecoms providers, take-up is spread across multiple social tariff products, which include different fixed broadband connection speeds and add-on options such as mobile and pay TV.

The overwhelming majority of social tariff take-up is in the fixed broadband market, with only 3% of social tariff take-up for mobile. The lower take-up probably reflects the availability of low-cost standard SIM-only and pre-pay deals, which in some cases may be cheaper than the social tariffs on offer.

Although social tariff take-up has grown, it remains low as a proportion of all eligible customers. As in previous reports, we have used the number of households receiving Universal Credit, the main working-age means-tested benefit, as a proxy for eligible households.[74] Data as of June 2025 from the Department for Work and Pensions (DWP)[75] shows an increase in the number of households claiming Universal Credit, now 6.2 million.[76] Therefore while social tariff take-up has increased, take-up as a proportion of eligible households fell from 9.6% in June 2024 to 8.6% in June 2025.

[71] As per the approach in our 2024 pricing trends report, the data we report for June 2025 does not include data from smaller providers.

[72] As set out in our 2024 pricing trends report, Shell Energy was taken over by TalkTalk in 2024. As TalkTalk does not offer social tariffs, Shell Energy's social tariffs are no longer available. Shell Energy social tariffs therefore do not feature in this year's social tariff take-up figures. Shell Energy's share of fixed broadband customers taking a social tariff in June 2024 was 4%.

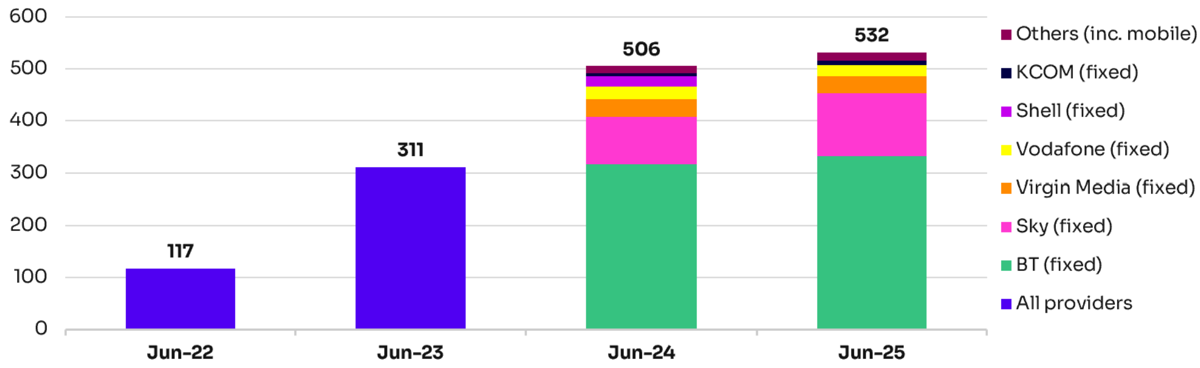
[73] In our first report, Affordability of Communications Services, in December 2020, three providers – BT, Virgin Media and KCOM – were offering cheap tariffs that had eligibility requirements linked to financial vulnerability, now referred to as social tariffs. Sky launched a broadband social tariff in April 2022. Vodafone first offered a mobile social tariff during the Covid-19 pandemic and launched its fixed broadband social tariff in October 2022.

[74] We recognise that the actual number of eligible households is higher, as most social tariffs include other means-tested benefits such as Pension Credit in their eligibility criteria. However, for consistency and simplicity, we refer only to households on Universal Credit.

[75] Data from DWP's website, as accessed in January 2026.

[76] The number of households on universal credit increased by 0.9 million from June 2024 (5.3 million households were on universal credit in June 2024, according to DWP revised data).

Figure 60: Social tariff take-up (000s): June 2022 to June 2025



Source: Ofcom / provider data

Raising awareness of social tariffs

In October 2025, our research[77] found that 70% of UK adults with a fixed broadband service and who were eligible for a social tariff[78] had not heard of the cheaper social tariff fixed broadband services they could access. This figure was consistent with October 2024 (69%).

We asked those eligible for social tariffs and who were aware of them where they had first heard of them. Social media (17%), friends and family (17%), and television (15%) were the top ways in which people had found out about social tariffs. We continue to call on providers to promote their social tariffs. In our Affordability of communications services: April 2023 update report we outlined our expectations on providers regarding the promotion of social tariffs:

- social tariffs should be prominent on the website;
- social tariffs should be easy to find on the website and via third-party searches;
- relevant pages should signpost social tariffs; and
- webpages should use clear language and highlight non-price protections.

Ensuring available social tariffs are easy to find, and signposted to eligible customers is a commitment in the UK Government's Telecoms Consumer Charter that the largest telecoms operators signed up to in February 2026.

Monitoring debt and disconnections in telecoms

We monitor levels of customer debt, rates of disconnection for non-payment and providers' practices against the good practice guidance set out in Ofcom's Treating vulnerable customers fairly guide.

This section summarises our analysis of overall levels of debt and disconnection in the fixed and mobile telecoms sectors. The analysis uses monthly data from July 2024 to June 2025, which was requested from providers that together accounted for 92% of the residential fixed telecoms market, and from more than 98% of residential mobile customers in Q3 2024. Where relevant, we also refer to July 2022 to June 2024 data, using the data on arrears and disconnections published in the 2023

[77] Ofcom's Communication Affordability Tracker, October 2025.
[78] The benefits that were included in the analysis to qualify as eligible were Income Support, Income-based Jobseeker's Allowance, Pensions Credit (Guaranteed Credit), Employment and Support Allowance (ESA), Universal Credit (where household has other earnings), Universal Credit (where household has no other earnings) and Personal Independence Payment (PIP).

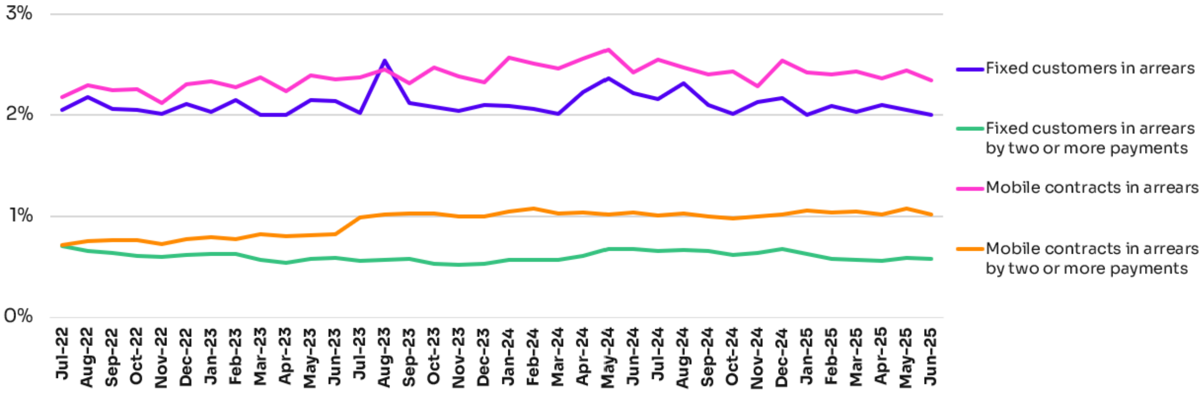
[Pricing trends for communications services report][79] as well as the [2024 Pricing trends for communications services report].[80] We found that across all our indicators, the figures were largely unchanged.

The proportion of customers in arrears remains broadly stable...

The data shows that the proportion of customers in arrears has remained broadly stable over the past three years. For the most recent period (between July 2024 and June 2025), between 2.0% and 2.3% of fixed telecoms customers, and between 2.3% and 2.5% of mobile contracts, were in arrears by at least one payment at the end of each month.

The proportion of customers in arrears who have missed two or more regular payments indicates how many customers have longer-term debt and are therefore at risk of loss of service through disconnection for non-payment. The analysis shows from July 2024 to June 2025, between 0.6% and 0.7% of fixed telecoms customers were in arrears by more than two payments. The proportion of mobile contracts in arrears by two or more payments was between 1.0% and 1.1% over the same period.

Figure 61: Proportion of customers in arrears and in arrears by two or more payments, fixed and mobile (%): July 2022 to June 2025



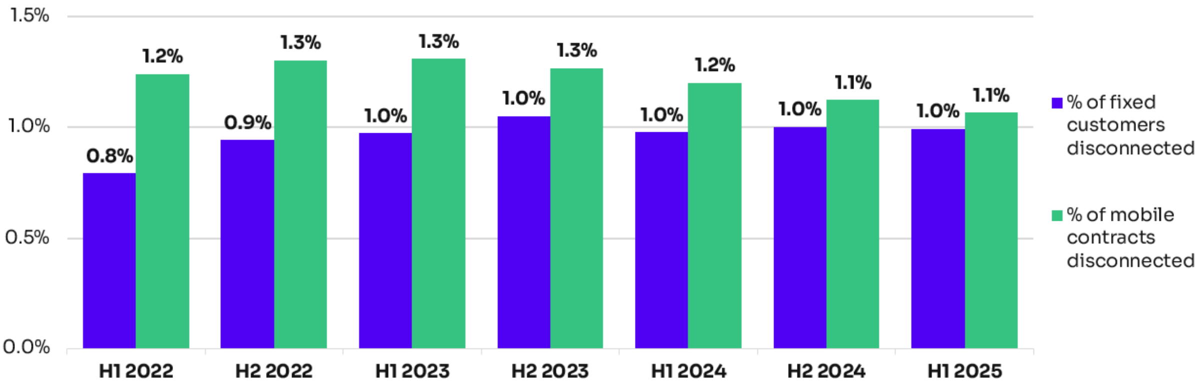
Source: Ofcom / operator data.
Note: For mobile we refer to the proportion of contracts, rather than customers.

....as have the proportions of customers disconnected for non-payment

The proportions of fixed telecoms customers and mobile contracts that were disconnected for non-payment have remained broadly stable over the past three years. Disconnections of fixed customers remained at around 1% (or c.250,000 fixed customers) during both the second half of 2024 and the first half of 2025. For mobile contracts, the proportion disconnected dropped slightly; from 1.3% (or c.540,000 mobile contracts) in the second half of 2023 to 1.1% (or c.510,000 mobile contracts) in the first half of 2025.

[79] Covering over 90% of the fixed market and over 85% of mobile telecoms customers.
[80] Covering over 93% of the residential fixed telecoms market and 98% of mobile telecoms customers.

Figure 62: Proportion of customers disconnected for non-payment, fixed and mobile: H1 2022 to H1 2025

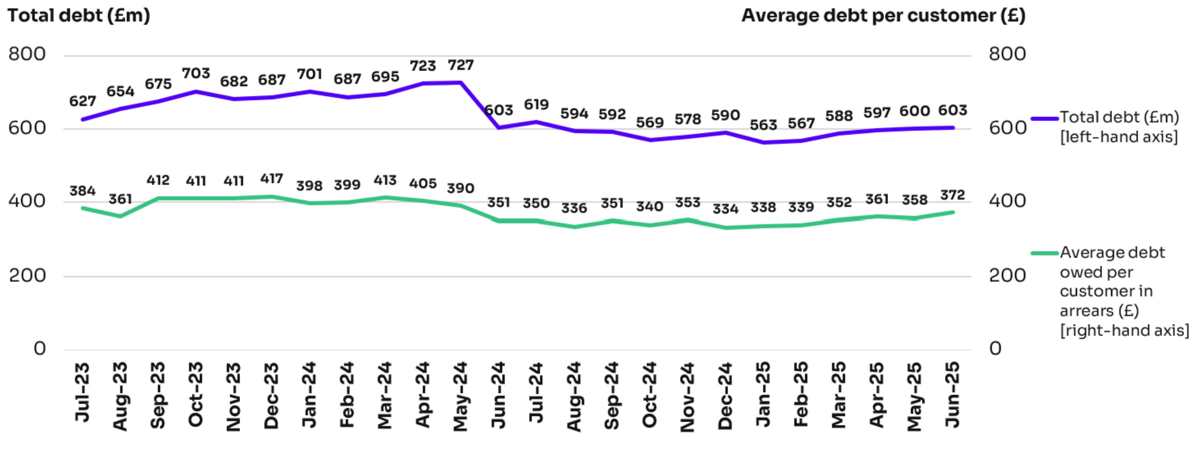


Source: Ofcom / operator data.
Note: For mobile we refer to the proportion of contracts, rather than customers. All figures have been rounded to one decimal place.

The average debt of customers in arrears has been broadly stable

Total customer debt owed to communications providers remained stable over the most recent reporting period, ranging between £563m (in January 2025) and £619m (in July 2024).[81] Over the same period, the average combined amount owed by customers in arrears to their fixed and mobile communications providers was broadly stable at about £350 per customer.

Figure 63: Total customer debt and average debt owed per customer in arrears, combined for fixed and mobile (£m): July 2023 to June 2025



Source: Ofcom / operator data.
Notes: For mobile we refer to the average debt per contract, rather than average debt per customer.

[81] For total customer debt and average customer debt, we do not compare with the data from the reporting period set out in the 2023 Pricing Trends report that covers the period before July 2023. This is because total customer debt is reported in absolute levels, and as our analysis since July 2023 captures a larger share of the market, we cannot directly compare it with the evolution of total customer debt in the previous reporting period. As a result, comparisons of total customer debt and average debt owed per customer in arrears with the pre-July 2023 reporting period could be misleading.

The total amount of ‘bad debt’ was broadly stable for most of the period

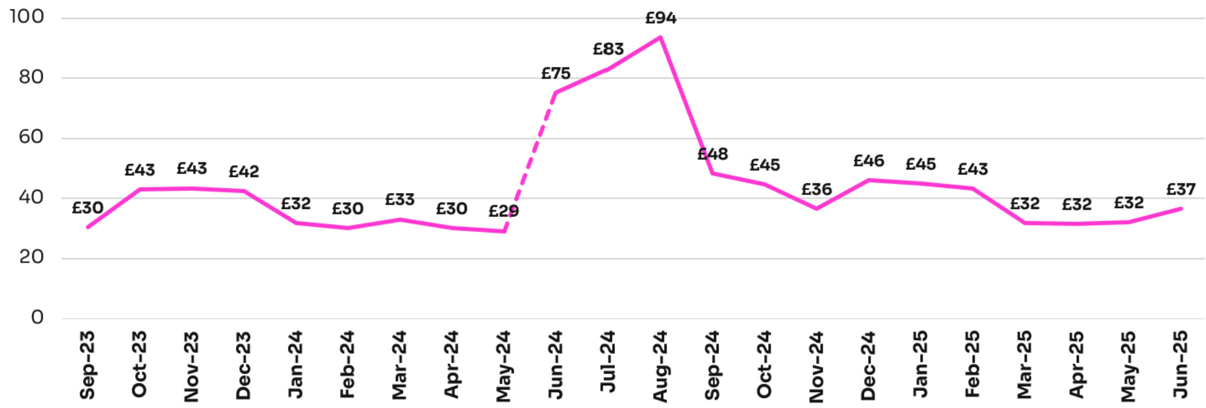
Bad debt figures represent the amount of customer debt that was written off by providers in a specific period. This metric may be an indication of affordability issues faced by customers as it indicates that the provider does not expect these debts to be paid back.

The amount of customer debt that was written off as bad debt by communications providers can be a volatile measure, as (i) providers tend to write off bad debt periodically; and (ii) providers tend to change their accounting practices relatively often. To obtain a better idea of how bad debt has evolved over the 24-month period analysed, we have used a three-month moving average.

About 7% of total residential fixed and mobile customer debt was written off by providers over the 12 months to June 2025. The three-month moving average for bad debt rose to £75m in June 2024 to £83m in July 2024, and £94m in August 2024, but then dropped back to £48m in September 2024.

However, this increase was primarily driven by at least one provider making changes to their systems or experiencing technical issues in relation to writing off customer debt as bad debt. We therefore consider that the June, July and August 2024 increases do not reflect developments in the market overall. The three-month rolling average remained between £48m and £37m over the remaining months of the most recent reporting period.

Figure 64: Total customer debt written off as bad debt (three-month moving average, £m): September 2023[82] to June 2025



Source: Ofcom / operator data.
Note: The June, July and August 2024 increase in the three-month average figure for bad debt written off was caused by at least one provider making changes to its systems, or correcting for technical issues faced earlier in the year in relation to writing off customer debt as bad debt. These technical issues will have inadvertently affected the levels of bad debt over the reporting period due its lagged effect.

[82] For total customer debt written off as bad debt, we do not compare with the data from the reporting period set out in the 2023 Pricing Trends report that covers the period before July 2023. This is because total customer debt is reported in absolute levels, and as our analysis since July 2023 captures a larger share of the market, we cannot directly compare it with the evolution of total customer debt in the previous reporting period. As a result, comparisons of total customer debt and average debt owed per customer in arrears with the pre-July 2023 reporting period could be misleading.

Terminology in this report

- **Bundle:** A combination of more than one service from a single communications provider. This can include fixed broadband and fixed voice, or pay TV and fixed broadband, and can be provided under one or multiple contracts.
- **Dual-play:** Two services delivered by a single communications provider, most commonly fixed broadband and fixed voice.
- **Hybrid pre-pay:** Hybrid pre-pay tariffs have no minimum contract period and offer an inclusive allowance of calls, texts, and data which usually expires after a month. Any use outside the inclusive allowances is deducted from a pre-pay credit balance.
- **In-contract:** Within the minimum contractual period for a specified service.
- **In-bundle spend:** Average monthly spend on services included within call/messaging/data allowances bundles for all subscriptions. This refers to the average monthly usage subscription charge, but not to any additional charges once customers have reached their usage allowance.
- **Inflation:** Inflation measures how the prices of goods and services change over a certain period, usually a year. We use the Consumer Prices Index (CPI), based on a basket of regularly purchased goods and services and published by the Office for National Statistics (ONS), to calculate real-terms price changes across the period of data presented in this report.
- **List price:** The list price is the price that the consumer will pay once the promoted period of their contract ends. This is usually at the end of the minimum contractual period.
- **Minimum contractual period (MCP)**: The length of contract the customer originally signed up to.
- **Nominal terms:** Sometimes referred to as 'cash terms' this represents the price of goods and services as they were paid for in the period they were purchased, without making any adjustment for inflation. This shows the actual money that has been paid for goods and services but does not reflect that prices and incomes generally increase over time, so £1 today is generally less of an individual's or company's total expendable income than £1 the previous year, making something which costs £1 today 'feel' cheaper. As prices tend to rise, changes expressed in nominal terms are generally higher than those expressed in real terms.
- **Out-of-contract:** Outside the minimum contractual period for a specified service, but still paying for the service (e.g. via a rolling monthly contract).
- **Out-of-bundle:** Average monthly spend on services outside any call/messaging/data allowances.
- **Pay-monthly:** A pay-monthly (post-pay) tariff is one offering an inclusive allowance of calls, texts, and data where the customer is retrospectively billed for the cost of any services they use outside this allowance.

- **Pay TV service:** A television service which viewers pay by subscription to watch a particular channel/channels.
- **Pre-pay:** A pre-pay (pay-as-you-go) tariff is a tariff in which the customer must have a credit balance to use any services outside any inclusive allowances, and the cost of these services is deducted from this balance (as with traditional pre-pay services). See also Hybrid pre-pay.
- **Promoted price:** The promoted price is a reduced price (compared to the list price) paid by a consumer when they sign up to a broadband service. The promoted price lasts for a specified period; often, but not always, equal to the minimum contractual period. Once the promoted period has expired consumers revert to paying the list price.
- **Quad-play:** Four services delivered by a single communications provider, most commonly fixed broadband, fixed voice, pay TV and mobile.
- **Real term/s:** Represents the price of goods and services each period after adjusting for general inflation using the Consumer Prices Index. This reflects that prices and incomes generally increase over time, so £1 today is generally less of a person or companies total expendable income than £1 the previous year making something which costs £1 today 'feel' cheaper. As inflation is usually above zero, changes expressed in real terms are usually lower than those expressed in nominal terms.
- **Residential:** Intended for the use of private individuals, rather than companies/commercial entities.
- **SIM-only:** A type of monthly mobile contract where the customer receives a physical SIM card or eSIM and an inclusive allowance of mobile data, minutes, and texts, but no device to use them with.
- **Social tariff:** Social tariffs offer discounted broadband or mobile services for people in receipt of certain benefits.
- **Standalone:** A customer taking a single service from a communications provider, not a bundle of two or more services. For example, standalone mobile refers to a customer taking just a mobile service from their provider.
- **Standard fixed broadband product:** A fixed broadband service with an advertised download speed of less than 30 Mbit/s.
- **Subscription video-on-demand (SVoD):** On-demand / streaming services that are available only on a paid-subscription basis. Examples include Netflix, Amazon Prime Video and Disney+.
- **Superfast fixed broadband product:** A fixed broadband service with an advertised download speed of 30 Mbit/s or higher (in the pricing analysis in this report, the superfast category excludes ultrafast broadband products).
- **Triple-play:** Three services delivered by a single communications provider, most commonly fixed broadband, fixed voice and pay TV.
- **Ultrafast fixed broadband product:** A fixed broadband service with an advertised download speed of 300 Mbit/s or higher.
- **Zero-rated/rating:** Zero-rating is where the data used by certain websites or apps does not count towards a customer's overall data allowance.

A1 Methodology

We use several datasets to analyse residential pricing trends. Here we set out the sources of these datasets, how they are compiled and the way in which they have been used in this report:

- operator data;
- tariff information from Pure Pricing;
- basket-based pricing using OECD's price benchmarking model;
- international price benchmarking using OECD's model; and
- consumer research – including the communications affordability tracker and the Switching Tracker (which includes the Engagement Index).

Operator data

Sector-level operator data

Ofcom requested data from the leading providers of residential fixed and mobile services in the UK using our formal powers. The data was obtained from the following providers of fixed and mobile services:

- fixed telecoms providers: BT (incl. EE and Plusnet), KCOM, Sky, TalkTalk, Three, Virgin Media O2 and Vodafone; and
- mobile service providers: BT (incl. EE), iD Mobile, giffgaff, Sky Mobile, Three (incl. SMARTY), Tesco Mobile, Virgin Media O2 and Vodafone.

We collected information regarding numbers of customers/subscriptions and average spend per customer/subscription, including the proportion of spend that was out-of-contract and out-of-bundle, for Q2 2025. The data was collected for the following services:

- Standalone fixed voice;
- Standalone fixed broadband;
- Standalone pay TV;
- Standalone mobile phone;
- Standalone mobile broadband;
- Dual-play with fixed broadband and fixed voice;
- Dual-play with fixed broadband and pay TV;
- Dual-play with fixed broadband and mobile phone;
- Triple-play with fixed broadband, fixed voice and pay TV;
- Triple-play with fixed broadband, fixed voice and mobile phone;
- Quad-play with fixed broadband, fixed voice, pay TV and mobile phone; and
- Other service combinations.

Customer-level operator data

For a more detailed overview of the customer-level data we collect from the mobile providers and the methodology used in our analysis, see the Monitoring Consumer Outcomes in the Mobile Sector report (p.6–7 and the annex section).

In brief, Ofcom collects anonymised customer-level data from most of UK mobile providers on an annual basis.[83] The data we currently have cover the period from January 2019 to June 2025. For each collection period, we obtain a 5% random sample from a provider's active residential customer population. For each sampled customer, we then collect details of their contract or pay as you-go (PAYG) agreement (such as recurring charges and usage allowances), monthly billing and usage data, as well as demographic information (e.g. year of birth).[84] Due to the design of the data collection methodology, data collected in different years may not be fully reconcilable. In addition, some providers may be unable to supply all requested information, for example, where certain data are not retained due to data retention policy.

Tariff information

Pure Pricing

We analyse residential line rental and bundled service prices using retail tariff information taken from Pure Pricing's Monthly Broadband Pricing reports. We also use retail tariff information from Pure Pricing's Monthly Mobile Pricing reports to analyse mobile SIM-only prices.

The prices listed in Pure Pricing's Monthly Mobile and Broadband Pricing reports are those offered to new customers by providers. These new customer prices are sometimes referred to as 'front-book' prices and are different to the 'back-book' prices charged to existing customers.

When we analyse promoted prices, we calculate the average monthly price paid across the minimum contractual period, taking any promoted discounts into account. When we look at list prices, we calculate the average monthly cost, excluding any promoted discounts.

The most recent Pure Pricing Monthly Broadband and Mobile reports used in this report (which cover the period from September 2022 to December 2025) included tariff information relating to the following providers:

Fixed telecoms providers		Mobile telecoms providers	
BT	Shell Energy	BT	Sky Mobile
Community Fibre	Sky	EE	SMARTY
EE	TalkTalk	giffgaff	Tesco Mobile
Gigaclear	Virgin Media	iD Mobile	Three
Hyperoptic	Vodafone	Lebara	Virgin Mobile
KCOM	Zen	Lyca Mobile	Vodafone
NOW		O2	VOXI
Plusnet		Plusnet	

[83] The first data collection covers January 2019 to December 2021. The second collection covers January 2022 to June 2023. The third collection covers July 2023 to June 2024 and the fourth collection covers July 2024 to June 2025. There are 14 mobile providers in the data collected so far: BT, EE, O2, Plusnet, Sky Mobile, SMARTY, Tesco Mobile, Three, Virgin Mobile, Vodafone, VOXI, giffgaff, iD Mobile and Talkmobile. For the second collection, we expanded the number of providers in the data to also include giffgaff, iD Mobile and Talkmobile. In the third collection, we stopped collecting Virgin Mobile data following the migration of its customers to O2, and Plusnet data following brand consolidation. In the fourth collection, we stopped collecting BT data due to its declining customer base.

[84] For most providers, demographic data is available only for contract customers.

Analysis of earlier periods includes additional providers who have subsequently exited the market.

Basket-based pricing analysis: UK price benchmarking model

To analyse the tariffs available in the UK, we use a bespoke pricing model, the Organisation of Economic Co-operation and Development (OECD) basket-based residential "multi-play" UK price benchmarking model, developed by the OECD. The model is populated with tariff data for fixed voice, mobile voice and data, fixed broadband, pay TV and 'bundled' services (i.e. incorporating more than one service, such as triple-play tariffs). As above, the prices are those available to new customers on providers' websites. The key objectives of the work are as follows:

- to identify and compare the pricing that is available for consumers buying fixed voice, mobile, fixed broadband, and pay TV services;
- to identify and compare the pricing that is available by purchasing communications services within bundled tariffs (for example, triple-play services, which typically offer a single bill for the delivery of fixed broadband, fixed voice, and pay TV services);
- to compare pricing across a wide range of service usage scenarios, from the requirements of those with basic needs to those of consumers with more sophisticated consumption; and
- to incorporate the cost of hardware such as set-top boxes or broadband modems/routers to reflect the full prices that consumers pay, and to compare like-with-like by allowing for equipment subsidies when they are included within propositions from service providers.

Basic methodology

Further detail is provided below but the basic principles are as follows: We constructed four household types and defined a usage profile of communications services comprising fixed voice, mobile, fixed broadband and pay TV appropriate for each one. A wide range of components were included within the household usage profiles to ensure as accurate as possible a representation of the real-world prices consumers pay. For example:

- fixed voice minutes were distributed by whether they were to fixed or mobile lines, and time of day (day, evening, weekend), and non-geographic calls were excluded from the analysis;
- mobile calls (and messaging) were split between on-net and off-net, voicemail was included and the 'affluent two-person household' and the 'networked family household' required 5G mobile services from 2020 onwards;
- call set-up and per-minute charging were incorporated, and a range of call lengths were used;
- the fixed broadband component was defined both by minimum headline speed and by minimum data allowance requirements; and
- the pay TV element included a digital receiver. Two tiers of pay TV were considered:
  - a basic pay TV service offering channels above those available on free-to-air TV, along with a Netflix SVoD service; and
  - a basic pay TV service offering channels above those available on free-to-air TV, along with premium film (first-run Hollywood movies) and sports (top-tier UK football matches) content.

Broadband routers and digital set-top boxes s are included within the household usage profiles and amortised over an appropriate period to attribute a monthly cost. This is necessary because this equipment is often inseparable from the service price, as operators frequently include subsidised or 'free' equipment (for example a mobile handset or a Wi-Fi router) within the monthly subscription. For similar reasons, connection and/or installation costs are included.

Data for 2020 was collected in October of that year. For all other years, including 2025, data was collected in July. For each year, the data covered details of every tariff and every tariff combination (including bundled services) from at least the largest three operators by retail market share (and from more than three operators, if this was required to ensure that a minimum of 80% of the overall market was represented).

Bundled tariffs (i.e. those that incorporate more than one service) were also collected. Only those tariffs available on the websites of the operators were included (i.e. the analysis excludes bespoke tariffs that are offered only to certain customers). The number of providers covered in the pricing model has increased over time.

Our model identifies the tariffs that offer the lowest price for meeting the requirements of each household. All sales taxes and surcharges have also been included, to reflect the prices that consumers pay.

To provide an illustration of representative prices for the individual services, and to illustrate the best value that consumers can get for their usage profile, we have provided the weighted average standalone pricing, illustrating the price of each individual service, as defined by the average of the lowest price tariff from each of the operators for each service, weighted by the market share of the service provider, in order to ensure fair representation.

Household types

For this study, we have considered hypothetical households and have defined their requirements for communications services based on average use in 2025. These were reviewed at the start of the 2025 study and have been updated. These household types are designed to be collectively broadly representative of the overall population.

Figure A1: Household types

Summary	Fixed voice mins	Mobile voice mins	Mobile SMS messages	Mobile handset data	Fixed broadband speed	Fixed broadband data	TV
Low-usage couple with basic needs	90	50	None	None	None	None	Free-to-air
		50	None	None			
Late adopter couple	60	100	50	2 GB	≥30 Mbit/s	100 GB	Free-to-air
		100	50	2 GB			
'Networked' family household	30	250	40	5 GB (5G)	≥100 Mbit/s	1,000 GB	Basic pay TV with HD/4K, plus OTT service/Netflix SVoD subscription
		250	40	5 GB (5G)			
		0	10	25 GB (5G)			
		0	10	25 GB (5G)			
Affluent two-person household	None	150	30	10 GB (5G)	≥300 Mbit/s	500 GB	Premium pay TV with movies and sports, and HD/4K
		150	30	10GB (5G)			

Source Ofcom / OECD.

Fixed voice usage profiles

The fixed voice usage profiles define the use per month for the household and calculate the monthly cost of using the fixed voice service. The elements of the usage profiles are listed below, with values for each of the four household types which use this service. The cost of customers' equipment is amortised over a five-year period.

Figure A2: Fixed voice usage profiles

	Affluent two-person household	'Networked' family household	Late adopter couple	Low-usage couple with basic needs
Outbound call mins	None	30	60	90
Type of calls	75% UK landline and 25% to UK mobiles			
Time of day	60% daytime, 25% evening and 15% weekend			

Source Ofcom / OECD.

Mobile voice and data usage profiles

To analyse the prices of standalone mobile services, we used six connection types to represent use across diverse types of consumers. We exclude the cost of a handset from our analysis.

Figure A3: Mobile usage profiles

	Outgoing call minutes per month	Outgoing SMS messages per month	Data use per month
Mobile connection 1	50	None	None
Mobile connection 2	100	50	2 GB
Mobile connection 3	250	40	5 GB (5G)
Mobile connection 4	None	10	25 GB (5G)
Mobile connection 5	150	30	10 GB (5G)
Mobile connection 6	200	20	50 GB (5G)

Source Ofcom / OECD.

To calculate the total price paid by consumers of buying a handset outright and using it with a SIM-only plan, compared with acquiring a handset with their airtime contract, we assign each type of mobile connection usage profile a low-, mid- or high-range handset across the time series.

Figure A4: Mobile usage profiles: handsets

	2020	2022	2023	2024	2025
Mobile user profile 1	Alcatel 10.66G	Nokia 105	Nokia 105	Nokia 106	Nokia 106
Mobile user profile 2	Alcatel 10.66G	Nokia 105	Nokia 105	Nokia 106	Nokia 106
Mobile user profile 3	Samsung Galaxy A21s	Samsung Galaxy A22 128 GB	Samsung Galaxy A23 5G 128 GB	Samsung Galaxy A35 5G 128 GB	Samsung Galaxy A36 5G 128 GB
Mobile user profile 4	Samsung Galaxy A21s	Samsung Galaxy A22 5G 128 GB	Samsung Galaxy A23 5G 128 GB	Samsung Galaxy A35 5G 128 GB	Samsung Galaxy A36 5G 128 GB
Mobile user profile 5	Samsung Galaxy A21s	Samsung Galaxy A22 5G 128 GB	Samsung Galaxy A23 5G 128 GB	Samsung Galaxy A35 5G 128 GB	Samsung Galaxy A36 5G 128 GB
Mobile user profile 6	Samsung Galaxy S20	Samsung Galaxy S22 5G 128 GB	Samsung Galaxy S23 5G 128 GB	Samsung Galaxy S24 5G 256 GB	Samsung Galaxy S25 5G 256 GB

Source Ofcom / OECD.

Bundled service profiles

To analyse the price of services when purchased as bundles, we use six household profiles with differing usage across services. Not all have been featured in this report.

Figure A5: Household profiles for bundled services

'Typical' household type	Summary	Fixed voice	Mobile voice	Mobile messaging	Mobile handset data	Fixed broadband	TV
Low-usage couple with basic needs	A low-usage couple with basic needs	Medium-high use	Low use	None	Low	None	Free-to-air
Late adopter couple	A broadband household with basic needs	Medium use	Medium-Low use	Medium-Low use	Low	Low use	Free-to-air
Mobile 'power user'	A mobile-only household	None	High use	Low use	High use	None	Basic pay TV with HD
'Networked' family household	A family household with multiple needs	Low use	High use	Medium-Low (depends on user)	Medium/ High use user (depends on user)	Medium use superfast	Basic pay TV with HD, plus OTT service/ SVoD
Affluent two-person household	A two-person household with sophisticated needs	Medium-high use	Low use	None	Low	None	Premium pay TV with movies and sports, and HD/4K

Source Ofcom / OECD.

International price benchmarking

We have used a pricing model, provided by the Organisation of Economic Co-operation and Development (OECD) to benchmark international prices for standalone fixed voice, mobile, and fixed broadband services. This model follows the same methodology as OECD's own ongoing price benchmarking work and is tailored to the UK market.[85] In addition, we have used a second model, also provided by the OECD, to benchmark dual-play (fixed broadband and fixed voice) and triple-play (fixed broadband, fixed voice and pay TV) bundle prices.

The OECD has ongoing data collection for three benchmarking systems following a harmonised methodology (i.e. fixed broadband, mobile voice and data and bundles).[86] For the international analysis in this report the OECD provided the following two tailored benchmarking systems: (i) OECD's basket-based international communications price benchmarking model for standalone services; and (ii) OECD's basket-based international communications price benchmarking model for bundled communication services.

The tariff data used in the analysis was taken from operator websites in Q3 2025, during August and September, depending on the service. The purchasing power parity-adjusted (PPP) exchange rates used to convert prices into GBP were for September 2025 and were taken from the OANDA web service (using exchange rates as of 1 September 2025) and the OECD database of comparative price levels (CPL).

Methodology

Our analysis compares the best prices available from the leading providers by retail market share in each country to buy a 'basket' of services. Baskets are based on typical usage levels for low, medium, and high users, as defined by the OECD, with some adjustments, made at Ofcom's request.

Figure A6: Baskets used in international price benchmarking analysis

	Low usage connection	Medium usage connection	High usage connection
Fixed voice services	20 outgoing calls	60 outgoing calls	140 outgoing calls
Fixed broadband services	Fixed broadband with advertised speed <30 Mbit/s and unlimited data	Fixed broadband with advertised speed ≥30 Mbit/s and <300 Mbit/s and unlimited data	Fixed broadband with advertised speed ≥300 Mbit/s and unlimited data
Mobile phone services	30 outgoing calls, no data	300 outgoing calls, 5 GB data	100 outgoing calls, 20 GB data

[85] The results presented in this report cannot be directly compared with the results published by the OECD because of the methodology and basket adjustments made for the analysis presented here. The methodologies referred to are the following: OECD (2017), Revised Telecommunication Price Baskets, Working Party on Communication Infrastructures and Services Policy, OECD, Paris, https://one.oecd.org/document/DSTI/CDEP/CISP(2017)4/FINAL/En/pdf.
OECD (2020), OECD bundled communication price baskets, OECD Digital Economy Papers, No. 300, OECD Publishing, Paris, http://dx.doi.org/10.1787/64e4c18a-en.

[86] OECD (2025), OECD Communication Price Basket Benchmarking systems, "Fixed broadband price benchmarking tool", (database). https://one.oecd.org/document/DSTI/CDEP/CISP(2017)4/FINAL/En/pdf
OECD (2025), OECD Communication Price Basket Benchmarking systems, "Mobile Voice and Data price benchmarking tool", (database). https://one.oecd.org/document/DSTI/CDEP/CISP(2017)4/FINAL/En/pdf
OECD (2025), OECD Communication Price Basket Benchmarking systems, "OECD Bundled Communication Price Benchmarking tool", (database). http://dx.doi.org/10.1787/64e4c18a-en.

	Low usage connection	Medium usage connection	High usage connection
Dual-play fixed broadband and fixed voice bundles	Fixed broadband with advertised speed <30 Mbit/s and unlimited data; anytime calls to UK landlines	Fixed broadband with advertised speed ≥30 Mbit/s and <300 Mbit/s and unlimited data; anytime calls to UK landlines	Fixed broadband with advertised speed ≥300 Mbit/s and unlimited data; anytime calls to UK landlines
Triple-play fixed broadband, fixed voice and pay- TV bundles	n/a	Broadband with advertised speed ≥30 Mbit/s and <300 Mbit/s and unlimited data; anytime calls to UK landlines; pay TV with >5 channels	Broadband with advertised speed ≥300 Mbit/s and unlimited data; anytime calls to UK landlines; pay TV with >5 channels and premium sport and films

Source Ofcom / OECD.

To give examples of the baskets that are used in the analysis, a mobile basket includes the requirement for a set number of calls, text messages and data use, and a fixed broadband basket includes a set amount of data and a required download speed. Voice call durations are set according to OECD definitions.

Analysis was undertaken for standalone fixed broadband, fixed voice and mobile phone services, dual-play (fixed broadband and fixed voice), and triple-play (fixed broadband, fixed voice and pay TV) bundles. For each service, and each basket, the leading providers' published residential prices are costed using the defined methodology for each profile, and the cheapest offer available from each provider is considered. These results are then used to identify the cheapest cost per country for each basket, as well as a weighted average.

Our analysis includes only residential tariffs; we do not look at the prices available to businesses. Promoted offers (e.g. in the form of introductory reduced prices) and offers where savings can be made by paying for services up-front (e.g. 'line rental saver' offers) are considered, where applicable.

We include tariffs from at least the three largest providers in each market, ensuring that we include providers which achieve a combined market share of at least 80% by service (except in the US, where providers may operate regionally). When we calculate 'average' prices, we weight the data according to the retail market share of each provider.

For the bundle pricing analysis, we have used the main providers in each of the countries covered (based on fixed broadband and pay TV as starting services). As market share data is not available for bundled services, the market share for fixed broadband is used when weighting average prices by market share.

Consumer research

The report also draws upon data from established Ofcom surveys.

The Communications Affordability Tracker

The Communications Affordability Tracker is a CATI (Computer Assisted Telephone Interview) survey run by Ipsos MORI with c.1,000 UK adults aged 18+ interviews conducted each wave. The tracker identifies those who are either the sole or joint decision-maker for communications services in their household and/or those who personally use a mobile phone. Quotas are set on age, gender, working status and geographical region. This sample also includes a Northern Ireland boost, which was subsequently down-weighted in the UK representative results. This provides us with continued understanding of consumer affordability issues in the UK communications markets (covering mobile, fixed broadband, fixed voice, pay TV, and on-demand TV services).

In 2025, we adjusted the tracker's frequency from quarterly to every six months. We believe that collecting data every six months will continue to provide users of these statistics with sufficient evidence to monitor the actions that consumers take to afford communications services, and will ensure that Ofcom's research investment continues to be allocated efficiently.[87]

The fieldwork for the data referenced in this report was conducted from 8 - 14 October 2025 among 1,098 UK adults aged 18+. Fieldwork generally takes place in the first two weeks of each month and therefore experiences largely reflect those of the previous month e.g., the October fieldwork will largely reflect experiences in September.

In this report we have included population estimates based on percentages from the October 2025 Communications Affordability Tracker and Office for National Statistics (ONS) estimates of the number of households in the UK.

For more information on how these population estimates were made please see the Affordability Tracker technical annex.

The Switching Tracker

The Switching Tracker is an annual survey conducted in August to September among household decision-makers for communications services, which monitors levels of participation in terms of switching and engagement activities. It looks at landlines, mobile, broadband and pay TV markets, as well as dual- and triple-play bundles. It uses a combination of post-to-web, post-to-phone and online methodologies.

In 2025 we interviewed 2,767 respondents aged 16+ in the UK across the different survey methods. Interviews were carried out between August and September 2025. A letter was sent to a sample of UK households inviting one member of the household who has responsibility for at least some communications services to complete the survey online or by telephone, depending on their preference. Those interviewed online following a postal invitation were asked for referrals to friends or family members without access to the internet. Once the post-to-online and post-to-phone interviewing was complete, some additional interviews were conducted using online panels to balance the overall sample and to ensure that the sample was nationally representative of the UK population.

For more information on the Switching Tracker, please see the Switching Tracker technical report.

The Engagement Index

Ofcom's Engagement Index is derived from the Switching Tracker. It takes a selection of behavioural and attitudinal factors into account and classifies consumers as being either active, browsers, dormant, unmotivated, apprehensive or resigned.

The first three groups (actives, browsers and dormant) are, to a greater or lesser extent, engaged in the market and are aware of alternative deals and/or suppliers. The resigned group are dissatisfied with the overall service provided by their supplier but have not made any effort to investigate other deals or negotiate a better deal. There could be several reasons for their non-engagement, including

[87] Confirmed changes to Ofcom's Communications Affordability Tracker 2025.

being in a location where choice of supplier (e.g. in a remote rural area where coverage from some mobile operators is poor) or choice of service (e.g. in an area where fibre broadband is not available) is limited.

The unmotivated group have not had any recent engagement with the market but are confident in their ability to compare costs, speak to their current provider and understand the language and terminology used by providers. Some of this group, although they do not lack confidence in their ability to engage with the market, claim that they would like to save money on their service, but lack the time to do so. In short, these people claim to have the skills they need to engage, but for one reason or another have chosen not to do so.

The final group, which we have termed 'apprehensive', have not had any recent engagement with the market, are not confident in their ability to compare costs, speak to their current provider or understand the language and terminology used by providers and this lack of confidence may be discouraging them from engaging.

Figure A7: Segment definitions in the Engagement Index

	2025
Active	A. Switched supplier in the last year, unless when moving home, OR at least two of the following: B. Are currently/planning to look for a new deal. C. Have initiated some supplier contact. D. Have conducted some competitor evaluation.
Browsers	Not active. One of the following: B. Are currently/planning to look for a new deal. C. Have initiated some supplier contact. D. Have conducted some competitor evaluation.
Dormant	Not browsers, but are/may still be in contract. One or more of the following: E. Switched supplier in the last 13-24 months (but not necessarily without moving home at the same time). F. Have never switched supplier but have been with their supplier for up to 24 months. G. Have upgraded or downgraded services in the past year, but this was provider-led and not initiated by the customer.
Unmotivated	None of A-G above AND confident comparing costs and speaking with current provider about new deals and understanding the language and terminology used by providers.
Apprehensive	None of A-G above AND not confident in comparing costs and speaking with current provider about new deals and understanding the language and terminology used by providers.

	2025
Resigned	None of A-G above AND not satisfied with overall service provided.

Source: Ofcom Switching Tracker carried out by Critical Research in August-September 2025.
Notes: Those who switched when moving are defined in the Engagement Index based on any other activity that would qualify them. Those who undertook activities shown under B-D above would be defined as active or browsers, while those who did not undertake these activities and simply took over the existing service in their new home would not be defined as active or browsers.