UK MARKET REFERENCE · JUNE 2026

WHO HOLDS THE MARKET

Monday, 8 June 2026

UK Broadband Market Share *2026.*

Who really runs UK broadband: the retail brands you pay, the networks that own the cables, and the altnet challengers reshaping the market. Every figure sourced and dated.

29.3M
UK FIXED BROADBAND LINES
Ofcom, Q4 2025

82%
HELD BY THE BIG FOUR
2023, Ofcom's last official split

~80
ALTNETS TRACKED
INCA / Point Topic, 2026

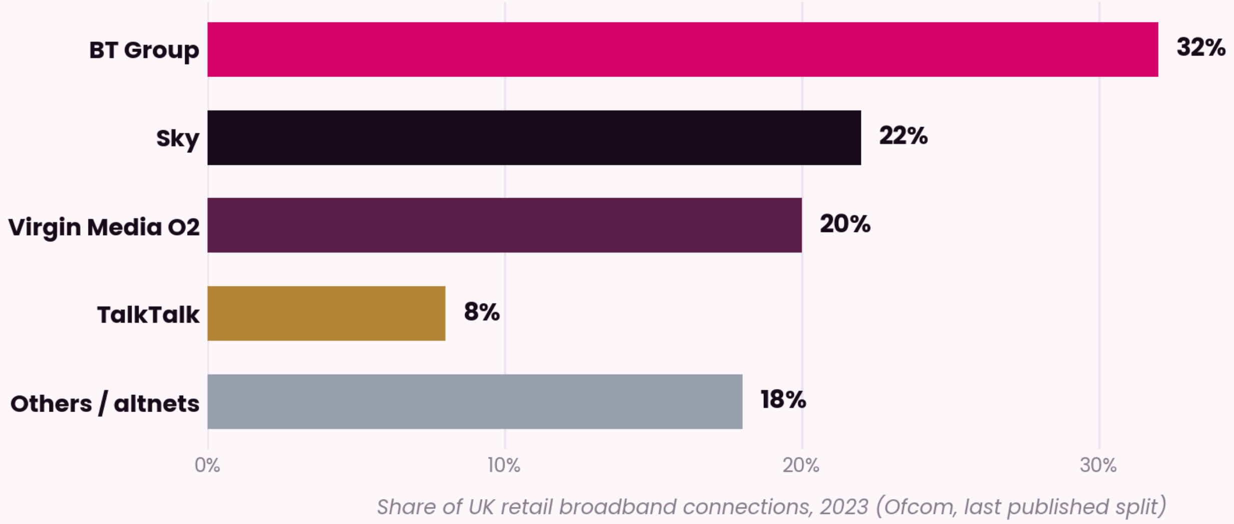
Written by **Dr Alex J. Martin-Smith**
Reviewed by **Adrian James**
Next review within 90 days

SECTION 01 · THE RETAIL MARKET

Who you pay

IN SHORT

Four groups still dominate the brands UK households pay: **BT Group, Sky, Virgin Media O2 and TalkTalk, together about 82% of retail connections** on Ofcom's last full published split. That split dates from 2023, because Ofcom's later quarterly data itemises only BT's share, and the picture has shifted since as altnets and Vodafone gain ground.



UK retail broadband share, 2023. This is Ofcom's most recent full provider split; later quarterly data itemises only BT's share, so no full 2024 to 2026 split exists.

Where the brands sit today

Exact 2026 shares are no longer published, but company results give the latest customer bases. These are the best current proxy.

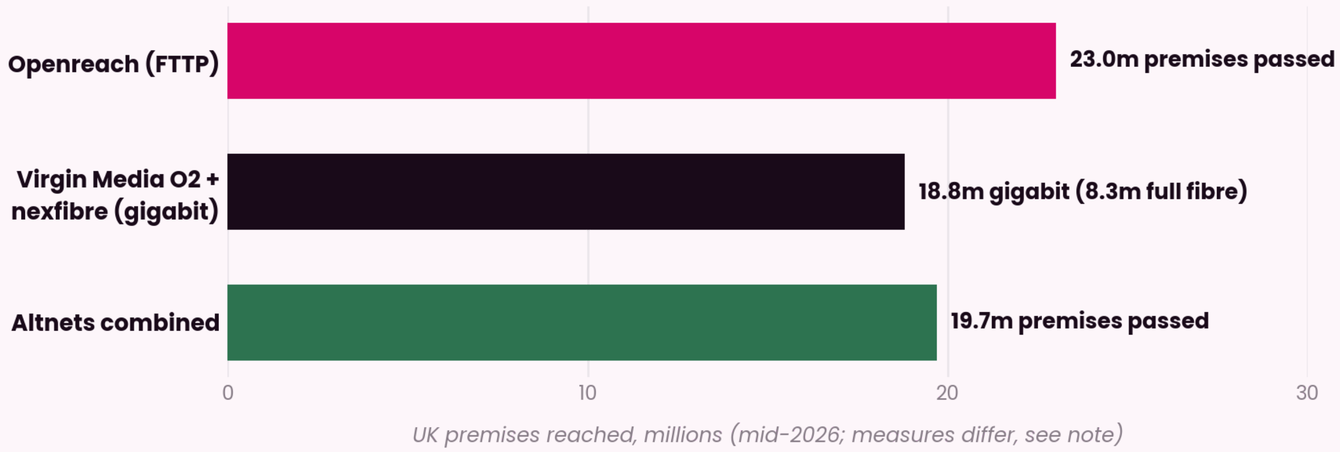
GROUP	BROADBAND CUSTOMERS	SOURCE
BT Group (BT, EE, Plusnet)	~8.8m	Point Topic estimate, Q3 2025
Sky (plus NOW)	~6.7m	Commercial estimate, UK and Ireland
Virgin Media O2	5.69m	VMO2 results, Q4 2025
TalkTalk	Contracting	~120k losses in Q3 2025 (Point Topic)

Within BT Group, EE is now the lead consumer brand with BT and Plusnet alongside it, and all three resell the Openreach network. Sky and Vodafone also resell Openreach, while Vodafone has been the strongest-growing major brand.

SECTION 02 · THE NETWORK LAYER

Who owns the cables

Behind those retail brands sit three network layers. Most brands rent space on **Openreach**; **Virgin Media O2** runs its own cable and fibre; and a growing field of **altnets** has built a third national layer. This is where the real competition now happens.



UK network reach, mid-2026. The three bars measure slightly different things (full-fibre premises passed, gigabit-capable premises, and altnet premises passed), and the footprints overlap, so they are not additive.

The three layers

NETWORK	REACH	DETAIL
Openreach (BT Group)	**23.0m** FTTP	Take-up 38%; 25m target by Dec 2026; 650+ providers resell it
Virgin Media O2	**18.8m** gigabit	8.3m now full fibre, including the nexfibre joint venture
Altnets combined	**19.7m**	3.5m live connections; an estimated 5m-plus altnet-only

Openreach is an independently governed, regulated BT subsidiary; most retail brands resell it. Virgin Media O2 is the main vertically integrated alternative, owning its network end to end. Figures: BT Group FY26 results; VMO2 Q4 2025; INCA State of the Altnets 2026.

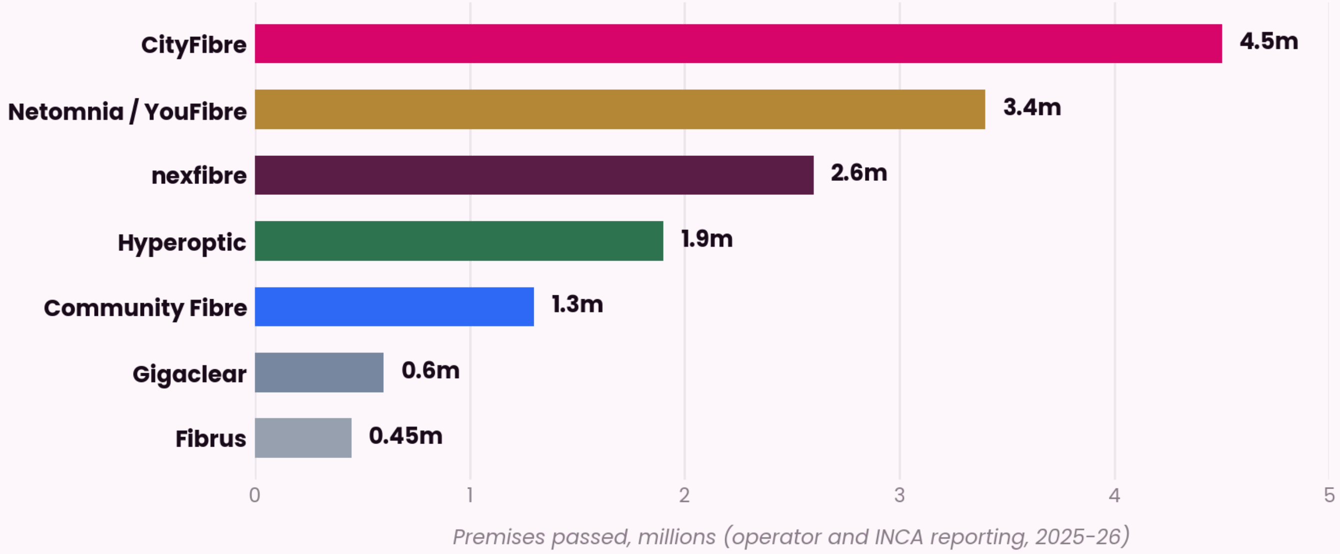
WHY IT MATTERS TO YOU

Where two or three networks overlap on your street, retail prices fall and choice rises. The network sets your real speed ceiling, so knowing who reaches your address matters as much as the brand on the bill.

SECTION 03 · THE CHALLENGERS

Altnets and consolidation

Around 80 alternative networks are tracked across the UK, and between late 2024 and late 2025 roughly **850,000 customers switched to an altnet**. Now the field is starting to consolidate.



Largest UK altnets by premises passed, 2025 to 2026. CityFibre is the biggest wholesale altnet, selling to Sky, Vodafone, TalkTalk and Zen. Sources: operator reporting and INCA.

The deal everyone is watching

In February 2026, **nexfibre agreed a £2bn acquisition of Netomnia** (owner of YouFibre and Brsk), which would create a wholesale challenger of real scale. The retail brands YouFibre and Brsk would move to Virgin Media O2.

- ✓ **Where it stands:** the Competition and Markets Authority opened an invitation to comment that closed on 8 May 2026. A formal investigation had not yet begun, and completion is expected later in 2026 subject to clearance.
- ✓ **Why it is contested:** CityFibre, the largest altnet, urged the regulator to scrutinise the deal, claiming roughly 80% network overlap and a risk of reduced competition. nexfibre disputes this, pointing to research it commissioned that put the full-fibre overlap nearer 17%. Ofcom has also asked the CMA to take a close look.
- ✓ **The wider trend:** CityFibre has already absorbed Lit Fibre and Connexin, and with build costs high, more consolidation is widely expected.

SECTION 04 · WHAT IT MEANS FOR YOU

What the shake-up means for you

A more contested market is good news for households and small businesses. More networks competing on your street tends to mean lower prices and more choice, and switching between them has never been easier.

The consumer and SME picture

- ✓ **Prices are falling in real terms.** Ofcom found average broadband prices fell about 6% in real terms in the year to September 2025, with the biggest falls on faster tiers.
- ✓ **Switching is simple.** More than two million homes have used One Touch Switch since September 2024, and the loyalty penalty for staying out of contract is £7 to £9 a month.
- ✓ **Altnets can undercut the big brands.** Where an altnet reaches you, entry full fibre often starts well below the national average bill, so it pays to check beyond the household names.
- ✓ **For SMEs, resilience is the lever.** A second network in your area is not just cheaper, it is a genuine backup option if your main line goes down.

The mobile market, for context

Mobile increasingly overlaps with home broadband through bundles and 5G home broadband. The UK now has three mobile network operators.

OPERATOR	NOTE
EE (BT Group)	Historically the largest mobile network
Virgin Media O2	O2 around 22m subscribers, late 2025
VodafoneThree	Merged 31 May 2025; about 27m customers

Smaller brands ride these same three networks rather than competing with them. Some are independent (Tesco Mobile, Sky Mobile), while others are owned by the operators themselves, for example Smarty by VodafoneThree and Giffgaff by Virgin Media O2. Together these brands are estimated to account for roughly 17% of the market.

Whoever owns the network, the best deal is the one at **your address**.
Compare every brand and network on total contract cost.

Compare now →

SECTION · REFERENCES

References and sources

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Written by **Dr Alex J. Martin-Smith** (CMgr, MBA, LLM, DBA), Lead Editor. Reviewed by **Adrian James**. Published 8 June 2026, next review within 90 days. Every figure is sourced below and logged in our public corrections process.

Every figure in this reference is backed by a publicly verifiable source, listed in APA 7th edition format. Retail shares are Ofcom's last published official split (2023); current customer bases are company results and Point Topic estimates, clearly labelled as such.

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REMEMBER

National market share describes the country, not your street. The networks and brands available at your address are what set your real price and choice, so always start with a postcode check at broadbandswitch.uk/compare.