



Fixed–mobile convergence in the UK: trends and forecasts 2023–2028



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April 2023, based on data up to 4Q 2022

About this report

This report provides detailed 5-year forecasts for the adoption of fixed-mobile converged (FMC) and multi-play services in the UK. It includes data on key metrics, describes key market developments and analyses operators' strategies.

It is based on several sources:

- Analysys Mason's *European Telecoms Market Matrix*, *European Core Forecasts*, *Video, Gaming and Entertainment* programmes and *Consumer survey*.
- Secondary data primarily from operators and regulators.

The latest version of the data is available in the Analysys Mason [DataHub](#), our online database tool.

WHO SHOULD READ THIS REPORT

- Integrated operators that have invested in fixed-mobile convergence as part of their retail strategy and want to understand its revenue growth potential.
- Mobile-only or fixed-only players that want to understand what their addressable market for non-converged services will be by 2028.
- Investors that observe, or have stakes in, the current and potential consolidation developments related to convergence in the UK.



GEOGRAPHICAL COVERAGE

Country modelled

- UK

Operators modelled individually

- BT
- Sky
- TalkTalk
- Virgin Media
- Vodafone



KEY METRICS

Number of accounts and connections

- Total multi-play accounts
 - FBB + pay TV
 - FBB + pay TV + mobile
 - FBB + mobile
- Fixed-mobile convergence (FMC) accounts
 - FMC share of FBB connections
 - FMC household penetration
- Number of FMC SIMs
 - Average number of FMC SIMs per account
 - FMC share of mobile connections

Revenue

- Total FMC retail revenue
- FMC average revenue per account (ARPA)
- FMC share of total telecoms retail revenue



Executive summary


Forecast results


Operator profile


Forecast methodology and assumptions


About the author and Analysys Mason

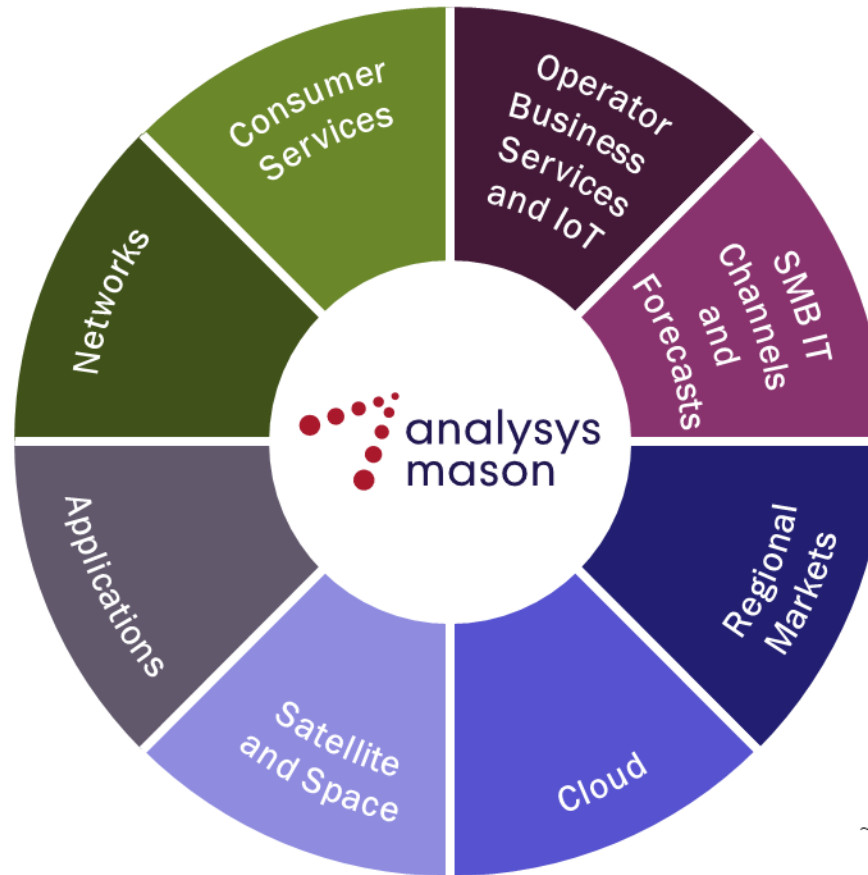
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 - Fixed-Mobile Convergence
 - Smart Devices
 - Future Comms
 - Video, Gaming and Entertainment


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 - ~2800 forecast and 280+ historical metrics
 - Regional results and worldwide totals
 - Operator historical data

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