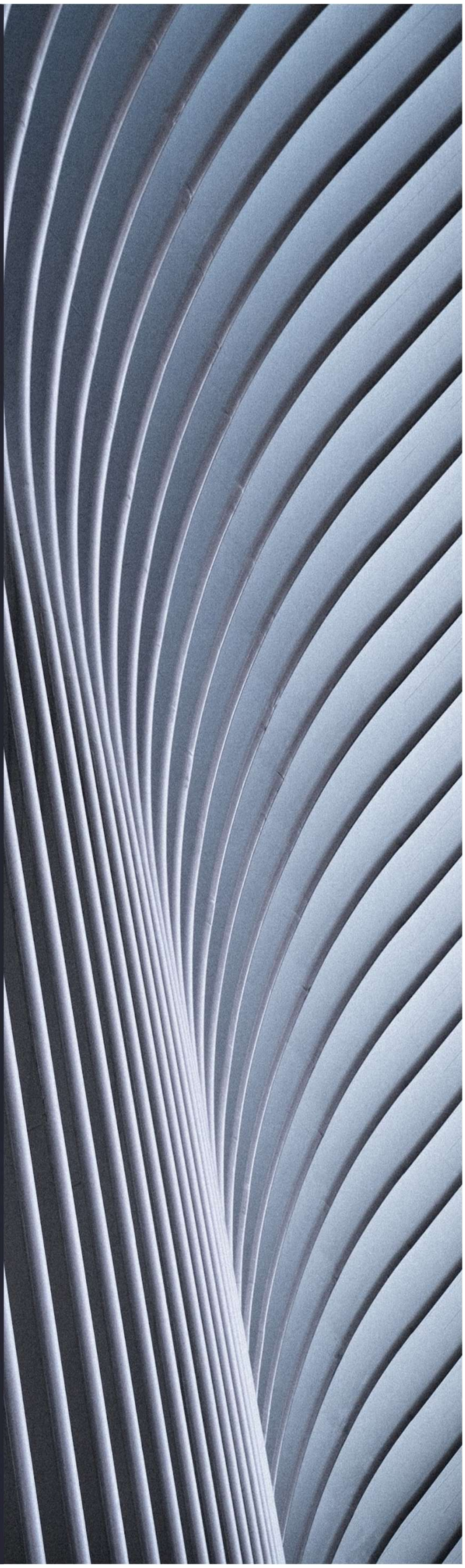
[4]insight

Telecoms Market Report 2025

Prepared for GCRA and JCRA

GUERNSEY COMPETITION & REGULATORY AUTHORITY

JCRA



July 2026

Introduction

This report is compiled by 4insight on behalf and in conjunction with the Guernsey Competition & Regulatory Authority (GCRA) and the Jersey Competition Regulatory Authority (JCRA). It provides an overview of the telecoms sector in the Channel Islands. Publishing this market information highlights the value generated by the sector across the Islands. As evidence-based regulators, the JCRA and GCRA rely on robust, up-to-date market insights to prioritise their work effectively. The report also supports market transparency and helps stakeholders, including consumers, to make informed decisions.

This report covers the calendar year 2025 and is based on data submitted by licensed telecoms operators. All currency numbers in this report are presented in nominal terms.

4insight, the GCRA and the JCRA would like to thank all operators for their contributions to this report.

Notes on comparability

Care should be taken when interpreting year-on-year changes in this report as:

- During 2025, Sure completed the integration of Airtel, which had previously operated as a separate company. Reflecting this change, most Sure data presented in this report relates to the combined operations of Sure and Airtel.
- The exception is mobile usage data (minutes, SMS and data), for which robust Airtel data was not available. Accordingly, the 2025 mobile usage for Sure reflects only customers on Sure tariffs as of December 2025 and excludes former Airtel customers who remain on Airtel legacy tariffs. Given this limitation, total market comparisons for mobile usage are not presented, although comparisons at the company level remain.
- The list of licensed operators included in the report was expanded for 2025. As a result, some changes in reported figures may be attributable to improved market coverage rather than underlying market developments.
- As part of the 2025 data submission process, some operators provided revised 2024 data for Guernsey and Jersey. Consequently, certain 2024 figures presented in this report may differ from those published previously.

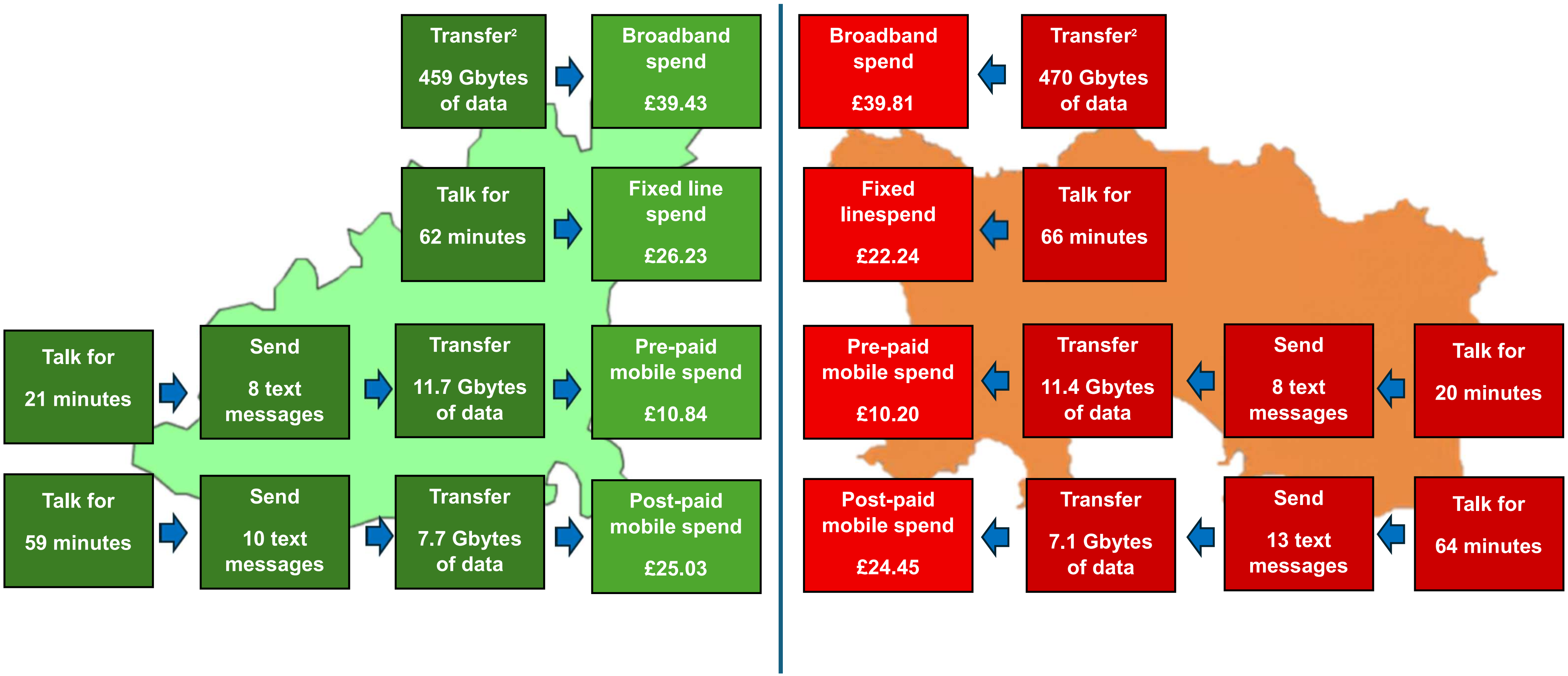
Where relevant, key caveats and other limitations are set out in the relevant sections of the report.

Summary

- Average monthly consumer spending on telecoms services in 2025 was at a very similar level to 2024 in Guernsey at £86.53, and decreased by 0.4% to £82.16 in Jersey
- Total turnover increased in Guernsey by 1.7% to £72.6m in 2025 and decreased by 2.3% to £110.1m in Jersey
- Employment within the telecoms sector decreased in Guernsey by 5.4% to 211 full-time equivalent staff in 2025, and in Jersey by 11.5% to 440 full-time equivalent staff
- In 2025, both Islands showed a decline in the number of fixed line minutes (Guernsey by 17.8 % and Jersey by 14.0%), continuing the decreasing trend since 2020
- Broadband penetration rates in both Islands were higher than the OECD average (36.5 subscriptions per 100 inhabitants): Guernsey had 42.1 subscriptions per 100 inhabitants and Jersey 42.7 (higher than the UK 42.3)
- Broadband data usage (including mobile substitutions) increased in both islands, but it remains below the UK average (531 GB/month). Guernsey subscribers used an average of 446 GB per month (a 12.3% increase from 2024), while Jersey subscribers averaged 459 GB per month (a 6.5% increase from 2024).
- Based on comparable operator datasets (JT and Sure):
    - The total number of mobile minutes has decreased by 10.3% in Guernsey and has decreased by 11.3% in Jersey compared to 2024
    - The total number of mobile SMS messages has decreased by 9.7% in Guernsey and has decreased by 17.3% in Jersey compared to 2024
    - The total mobile data volume has increased by 2.9% in Guernsey and has increased by 11.1% in Jersey compared to 2024
- Total mobile revenue has increased in Guernsey by 0.8%, but decreased in Jersey by 3.1%

Consumer Snapshot 2025[1]

Guernsey consumer average monthly activity | **Jersey consumer average monthly activity**



[1] Talk for, Send and Transfer figures for pre-paid and post-paid mobile are averages. These exclude customers on legacy Airtel tariffs due to unavailable Airtel usage data. See the comparability note in the Introduction for further details.
[2] Excluding mobile substitutions.

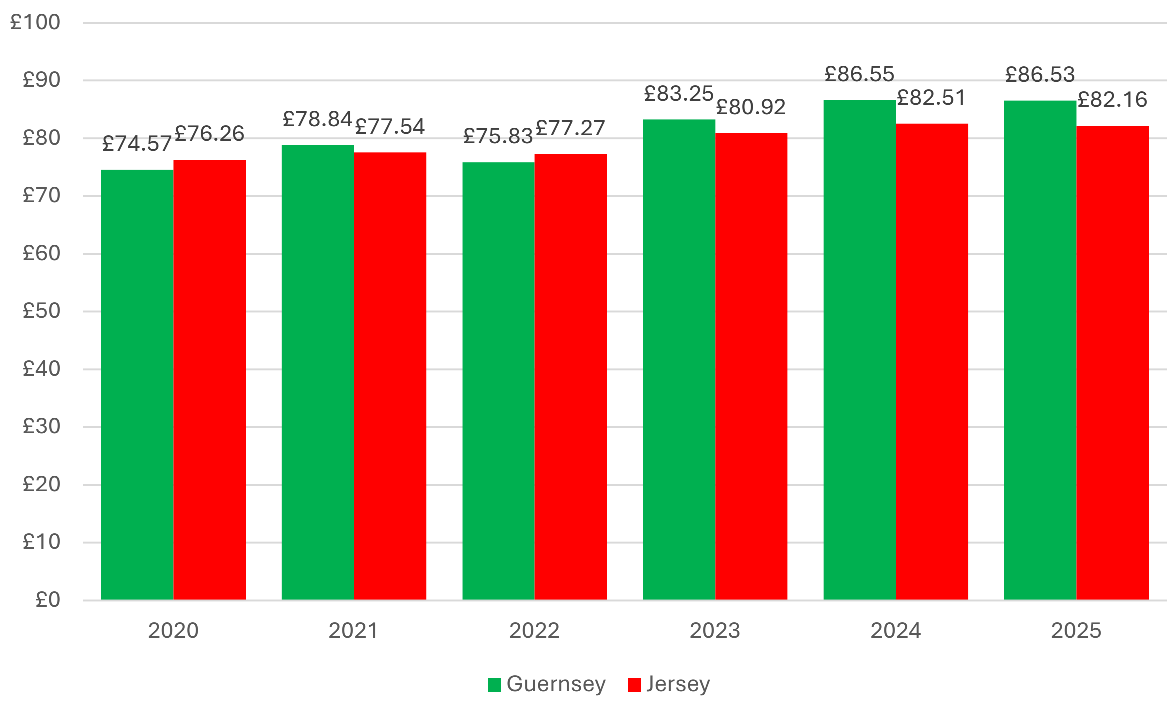
Contents

Average monthly consumer spend on telecoms services

Average monthly consumer spend on telecoms services in the Channel Islands was £83.96 in 2025; down from £84.16 in 2024[3]. This includes expenditure on broadband, fixed line and mobile services.

As shown in Figure 1, average monthly spend in Guernsey at £86.53 was very similar to 2024, whilst monthly spend in Jersey decreased slightly by 0.4% to £82.16 compared to 2024. Growth in consumer spend had been rising slowly between 2022 and 2024, but has been stagnant in 2025.

Figure 1: Average consumer spend on telecoms services in the Channel Islands, 2020 to 2025



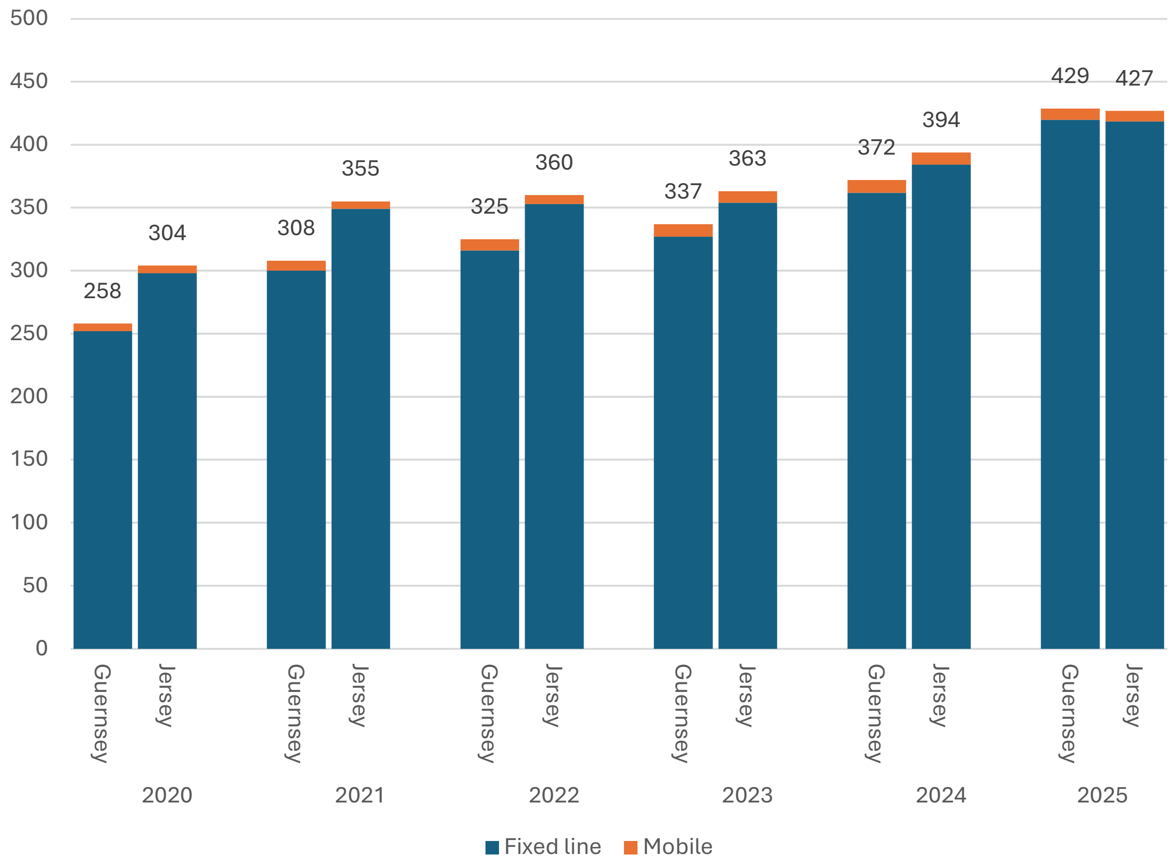
[3] 2024 spend data for Jersey has been updated since the 2024 report was published due to updated information received from providers

Consumer data usage

As shown in Figure 2, average data download usage in Guernsey was 429 Gbytes in 2025. This was made up of 8.9 Gbytes of mobile data and 419.8 Gbytes of fixed line broadband download data. In Jersey, average data download usage was 427 Gbytes; this was made up of 8.4 Gbytes of mobile data and 418.3 Gbytes of fixed line broadband download data[4].

Fixed line broadband data download usage has increased in both Guernsey and Jersey in 2025.

Figure 2: Average data download usage in the Channel Islands, 2020 to 2025[5]



Both Jersey and Guernsey consumers now have a very similar levels of monthly data usage.

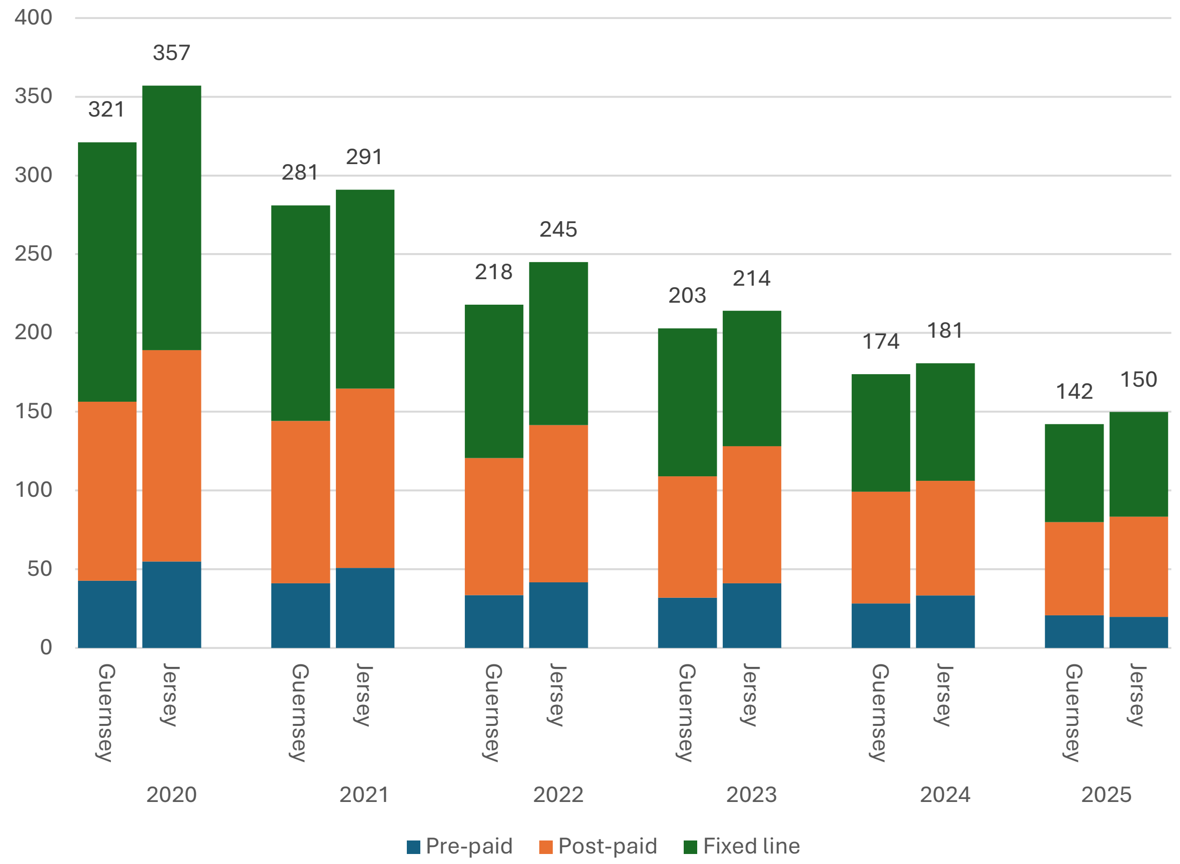
[4] 2024 download data for Guernsey has been updated since the 2024 report was published due to updated information received from providers
[5] In 2025 average data download usage for mobile exclude customers on legacy Airtel tariffs due to unavailable Airtel usage data.

Consumer voice calls

In 2025, Jersey consumers averaged 66 minutes of fixed line calls, 20 minutes of pre-paid mobile calls and 64 minutes of post-paid mobile calls per month, totalling 150 minutes per month. In Guernsey, consumers averaged 62 fixed line, 21 pre-paid mobile, and 62 post-paid mobile call minutes per month, totalling 142 minutes per month.

Compared to 2024, fixed line call minutes decreased by 10.9% in Jersey and by 16.6% in Guernsey.

Figure 3: Average monthly fixed, pre- and post-paid call minutes made in the Channel Islands, 2020 to 2025[6]



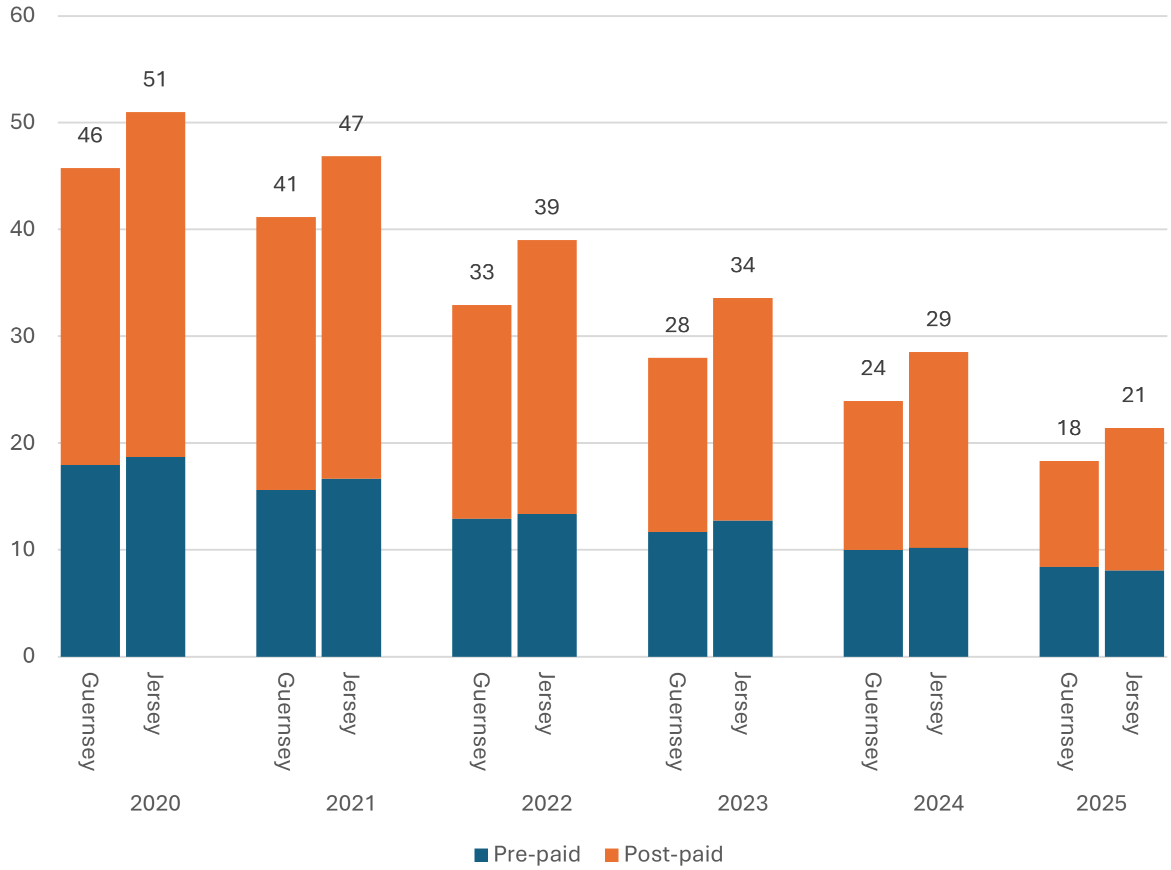
Average monthly call minutes have decreased every year since 2020; most notably from fixed lines. In 2025, total monthly call minutes in both Guernsey and Jersey were less than half the average number recorded in 2020.

[6] In 2025 average pre-paid and post-paid minutes for mobile exclude customers on legacy Airtel tariffs due to unavailable Airtel usage data.

Consumer text messages

In 2025, Jersey consumers sent an average of 8 pre-paid and 13 post-paid SMS messages per month. In Guernsey, the equivalent figures were 8 pre-paid and 10 post-paid messages per month.

Figure 4: Average monthly pre- and post-paid SMS messages in the Channel Islands, 2020 to 2025[7]



The average number of pre-paid and post-paid SMS messages sent per subscriber in both Islands has been decreasing since 2020.

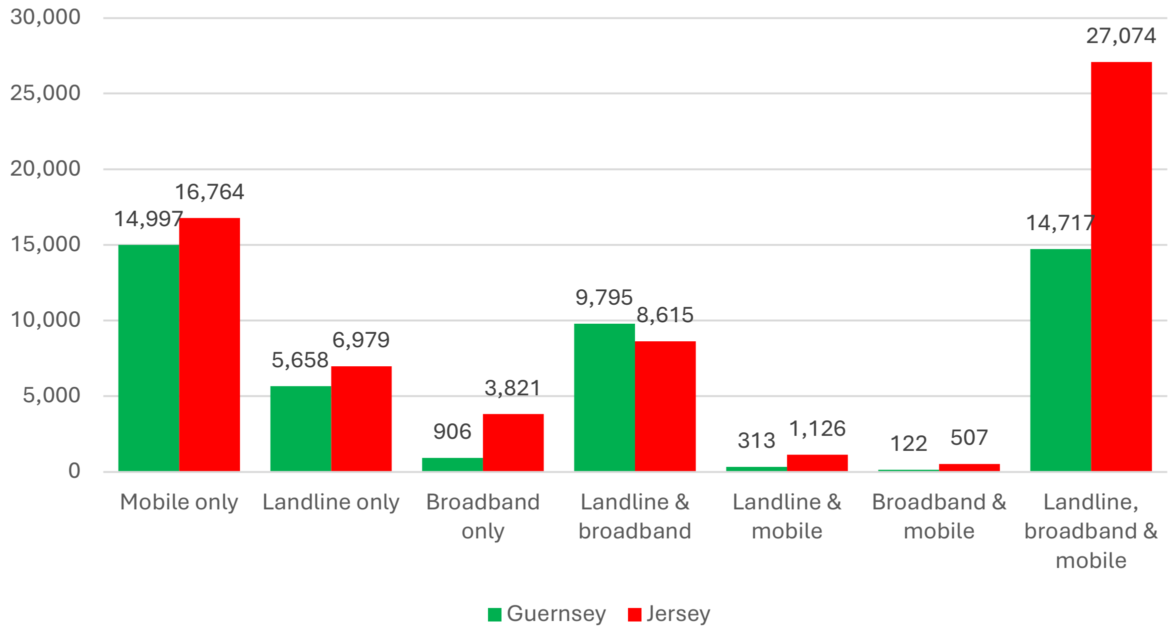
In 2025, the number of monthly SMS messages sent was again higher in Jersey than in Guernsey.

[7] In 2025 average pre-paid and post-paid SMS messages exclude customers on legacy Airtel tariffs due to unavailable Airtel usage data.

Subscriptions

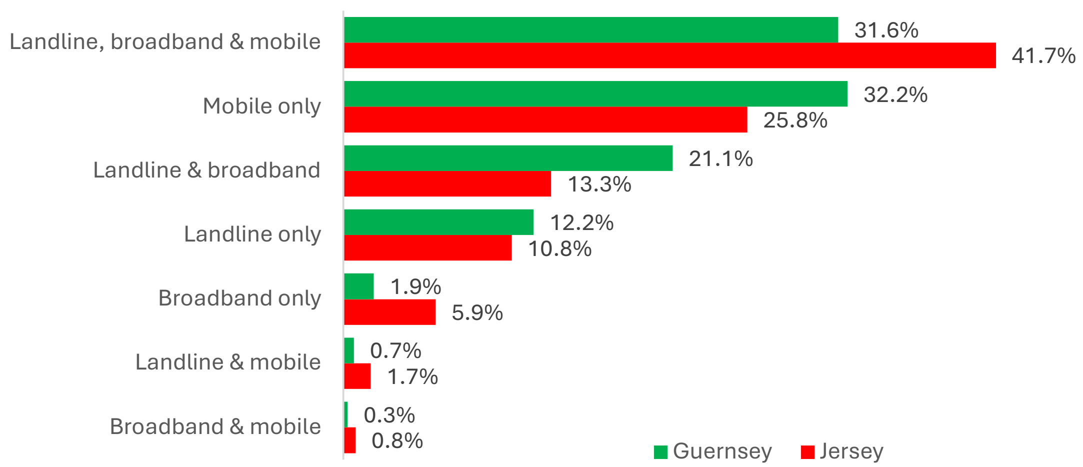
In 2025, Sure completed its acquisition of Airtel, and as a result, subscription data by package type cannot be directly compared with previous years due to changes in reporting and structure.

Figure 5: Subscriptions by package type, 2025



In the Channel Islands, just over half (55.9%) of subscriptions were bundles. In Jersey, 55.9% of subscriptions were part of a combined package compared to 53.6% in Guernsey. Of these 41.7% of subscriptions in Jersey and 31.6% of subscriptions in Guernsey were packages containing landline, broadband and mobile.

Figure 6: Subscriptions by package type in Guernsey and Jersey, 2025



Economic statistics for the telecoms sector 2025

Guernsey

£72.6 million

Total revenues from Guernsey-based customers

£7.4 million

Contribution to Guernsey tax through staff income tax, social security, corporate tax, property rates

211 staff employed

in Guernsey in the supply of telecoms services to Guernsey customers as at the end of 2025

£17.1 million

Capital investment in fixed and mobile networks, IT infrastructure and other telecoms activities

542

Retail leased lines, primarily used by organisations for voice or data services

Jersey

£110.1 million

Total revenues from Jersey-based customers

£14 million

Contribution to Jersey tax through staff income tax, social security, corporate tax, property rates & GST

440 staff employed

in Jersey in the supply of telecoms services to Jersey customers as at the end of 2025

£33.6 million

Capital investment in fixed and mobile networks, IT infrastructure and other telecoms activities

466

Retail leased lines, primarily used by organisations for voice or data services

Turnover of the telecoms sector

Total turnover of the telecoms sector in the Channel Islands (including fixed, mobile, broadband, the sale of handsets and the provision of telecommunications associated with data centre/hosting services) was £182.7m in 2025, down 0.8% from £184.1m in 2024[8]. Total turnover in Guernsey increased by 1.7% to £72.6m in 2025. In Jersey, total turnover decreased by 2.3% to £110.1m.

Figure 7: Total turnover of the telecoms sector, 2020 to 2025

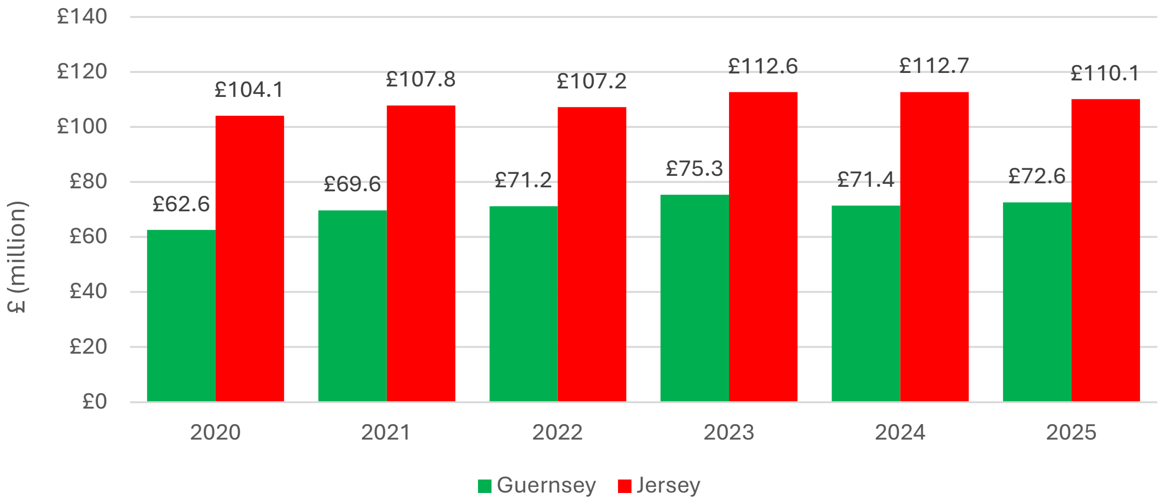
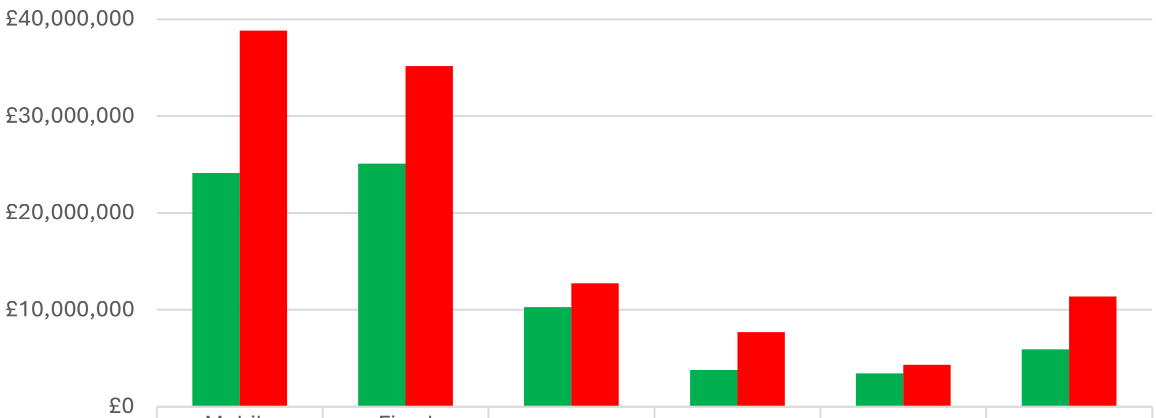


Figure 8: Total turnover by type of telecoms activity, 2025



	Mobile network retail	Fixed network retail	Leased lines	Wholesale	Data centre	Other
Guernsey	£24,088,572	£25,099,858	£10,275,073	£3,782,500	£3,438,373	£5,910,624
Jersey	£38,808,333	£35,160,940	£12,712,430	£7,709,906	£4,312,929	£11,370,365

Note 1: The turnover figures within the chart above should be considered as the total turnover amounts for each activity. Definitions for revenue within each individual section of the report differ from the above.

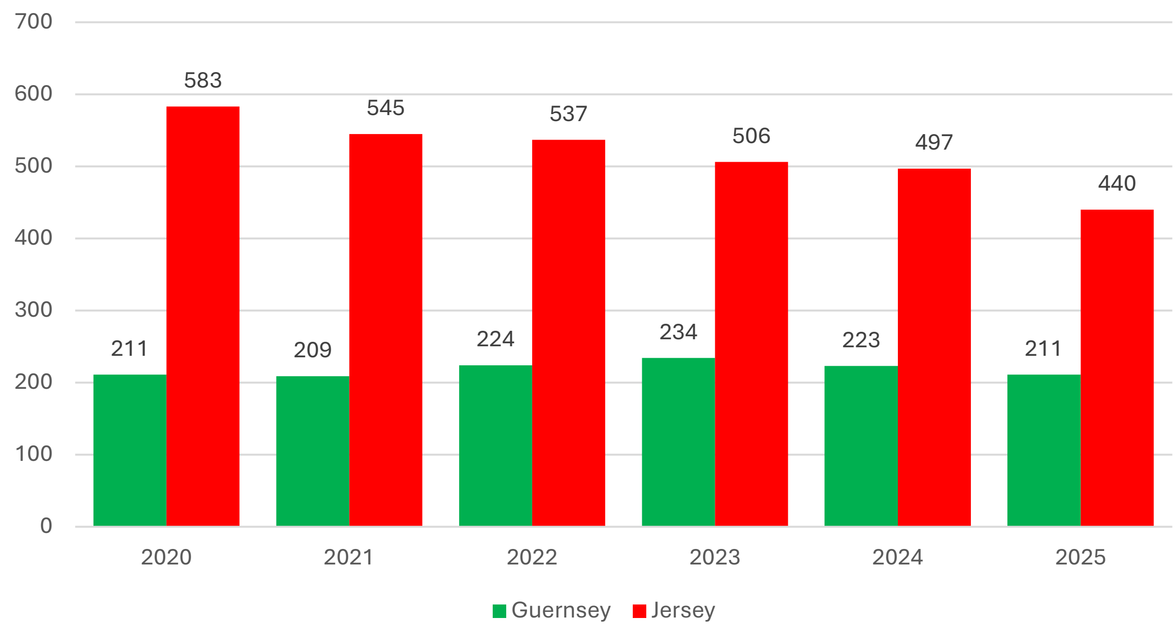
Note 2: Wholesale is defined as those products sold on to other retailers for resale.

[8] 2024 data for Jersey has been updated since the 2024 report was published due to updated information received from providers

Employment in the telecoms sector

Figure 9 shows the number of full-time equivalent staff employed in the telecoms sector in Guernsey and Jersey at the end of each year since 2020. Across the Channel Islands, the sector employed 651 full time equivalent staff at the end of 2025, representing a decrease of 69 staff and continuing the overall downward trend seen since 2020.

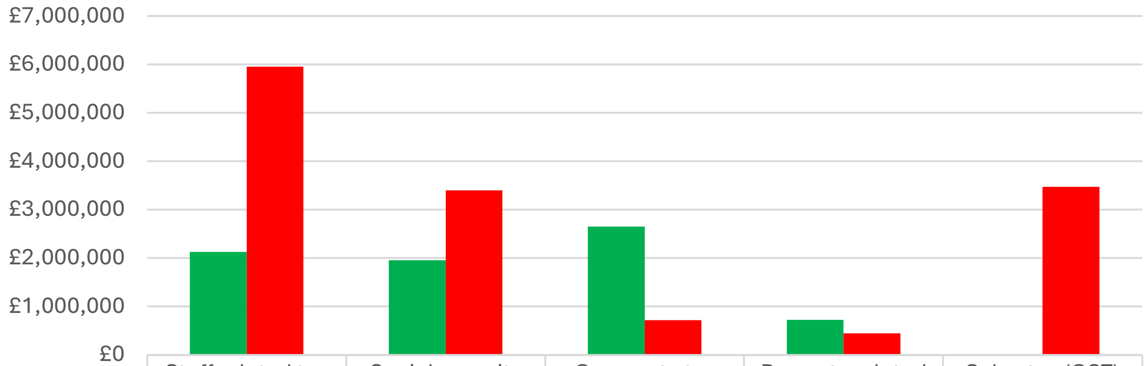
Figure 9: Full time equivalent employees in the telecoms sector, 2020 to 2025



Taxation contributions

Across the Channel Islands, the telecoms sector contributed £21.4m in taxation in 2025 (£22.1m in 2024); 7.4m in Guernsey (£7.7m in 2024) and £14.0m in Jersey (£14.3m in 2024).

Figure 10: Contributions by type of taxation from the telecoms sector, 2025



	Staff related tax	Social security	Corporate tax	Property related	Sales tax (GST)
Guernsey	£2,124,457	£1,953,976	£2,651,008	£720,173	£0
Jersey	£5,955,062	£3,394,675	£716,800	£445,721	£3,468,212

Note: Social security includes staff and employer contributions paid by the employer. Sales tax is not applicable in Guernsey.

Capital investment

Total capital investment in the Channel Islands increased to over £50 million in 2025. Following a significant rise in capital investment across both islands in 2023, Guernsey recorded a smaller increase in 2024, followed by a small decrease in 2025 with investment falling from £17.4 million to £17.1 million. In contrast, Jersey experienced a significant increase in capital investment, rising from £20.1 million in 2024 to £33.6 million in 2025. Over three-quarters of the capital investment in Jersey in 2025 was on the mobile access network.

Figure 11: Capital investment in the telecoms sector, 2020 to 2025

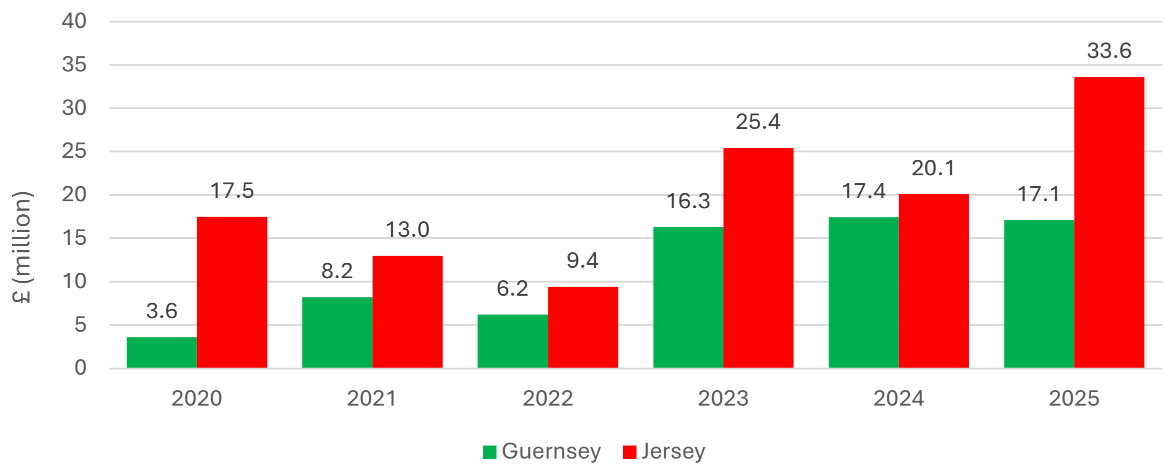
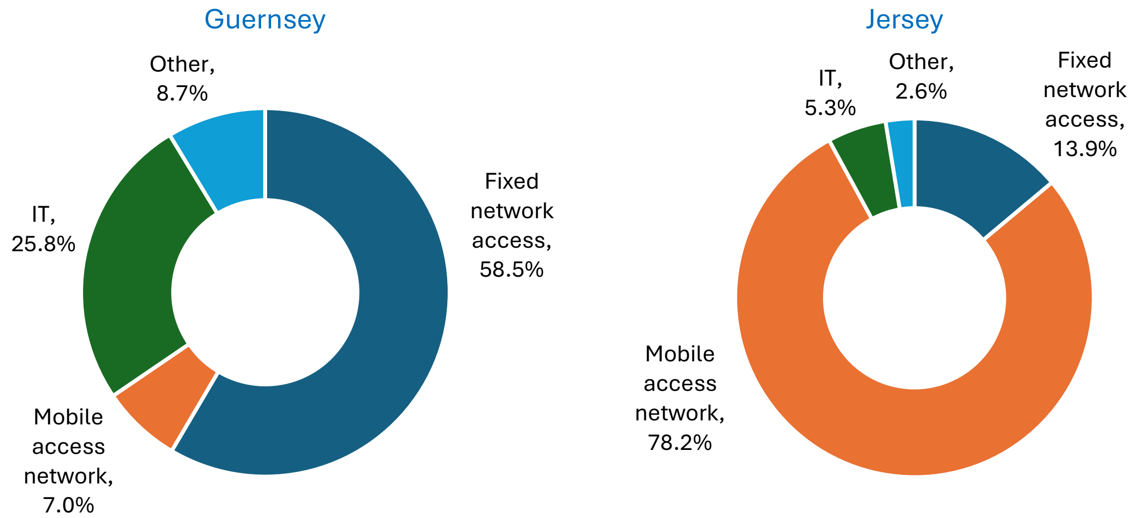


Figure 12: Percentage of capital investment by type, Guernsey and Jersey, 2025



Fixed network market

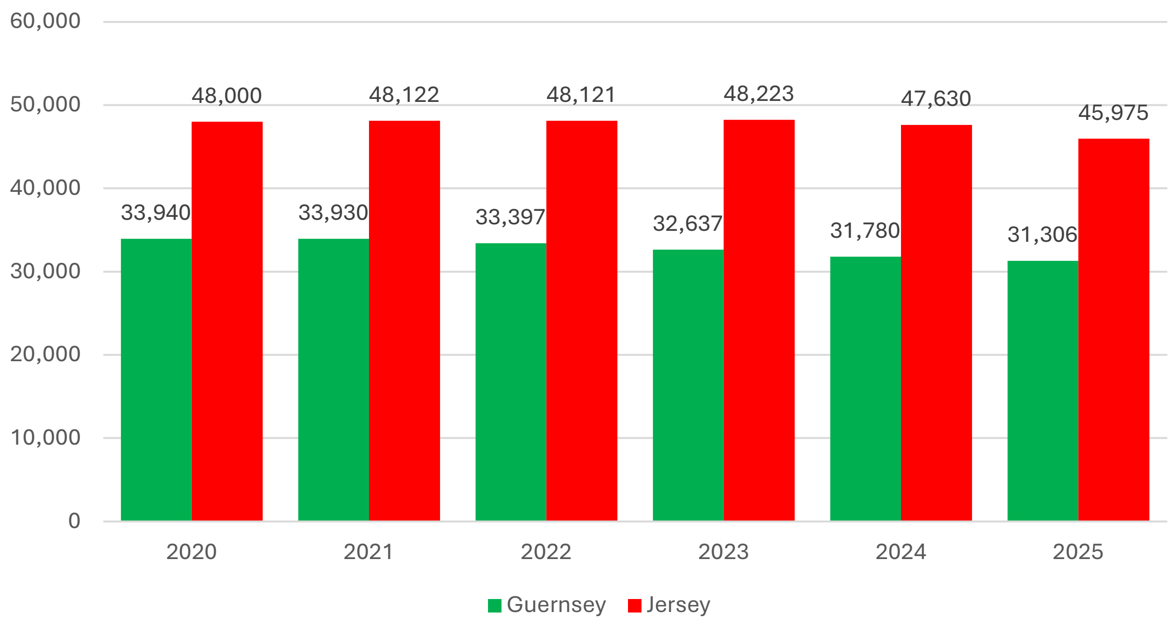
The fixed network market is characterised by end-user equipment that is in a fixed geographic location and used to make/receive voice calls, and to support broadband and leased line services. In contrast, the end-user equipment in the mobile market is not fixed to a single geographic location and moves easily from place to place. Various technologies are used in fixed networks including traditional copper circuits, fibre optics and satellite. This section contains information on fixed line (voice), fixed network broadband, fixed network leased line services and satellite.

Fixed line market

Total number of lines and subscriptions

In 2025, the number of fixed lines and subscriptions decreased in both islands. Jersey subscriptions decreased by 3.5% to 45,975, and Guernsey subscriptions decreased by 1.5% to 31,306.

Figure 13: Number fixed line subscriptions in the Channel Islands, 2020 to 2025



In 2025, both Jersey and Guernsey saw a continuation of the downward trend in fixed line subscriptions.

In Jersey, 96.7% of retail subscriptions in 2025 were for consumer products[9], and in Guernsey, 97.4% of retail subscriptions in 2025 were for consumer products.

In addition to fixed line connections, a number of operators retail data-only sim cards, which can be used in place of a fixed connection for broadband internet access. These types of internet access are considered in the Mobile market section of this report.

[9] In Jersey, all standard landlines offered by the main operators are classified as consumer products

Alternative carrier services

Carrier select services have been available in the Channel Islands for a number of years and, in 2015, Wholesale Line Rental (WLR) services also became available. Table 1 shows the number of subscriptions to such services at the end of 2025.

Table 1: Subscriptions to alternative carriers

	Guernsey	Jersey
Carrier select	8,427	178
Wholesale line rental	5,715	13,845
Total	**14,142**	**14,023**

Subscriptions to carrier select services have decreased in both Islands compared to 2024. Subscriptions in 2025 to WLR have decreased in Guernsey but increased in Jersey.

Note, as part of the data collection for this report, information on cloud-based voice services was also gathered. However, due to data quality concerns, these services are not included in the analysis presented here. Their inclusion will be considered for future editions of the report.

Fixed line minutes

Figures 14 and 15 show the numbers of minutes carried by operators in Guernsey and Jersey annually, between 2020 and 2025. For 2025, both Guernsey and Jersey show a continuing decrease in the number of fixed network call minutes originating in the Islands. These are both in line with the trend of decreasing number of fixed lines call minutes since 2020.

Compared to 2024, fixed line call minutes decreased in Guernsey by 17.8% to 23.3 million and in Jersey by 14.0% to 36.6 million.

Figure 14: Number of fixed line minutes in Guernsey by operator, 2020 to 2025

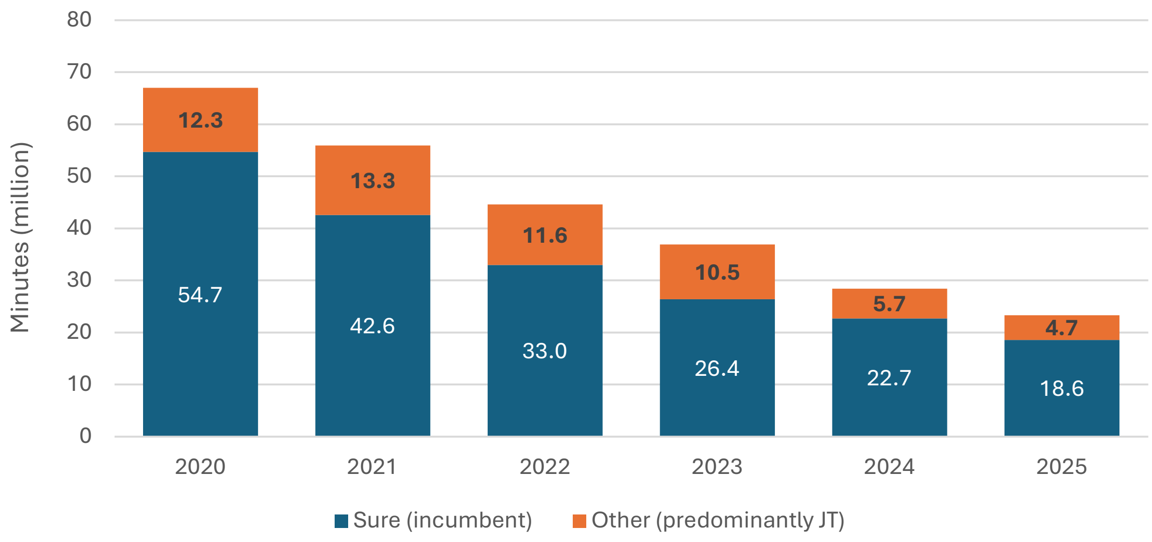
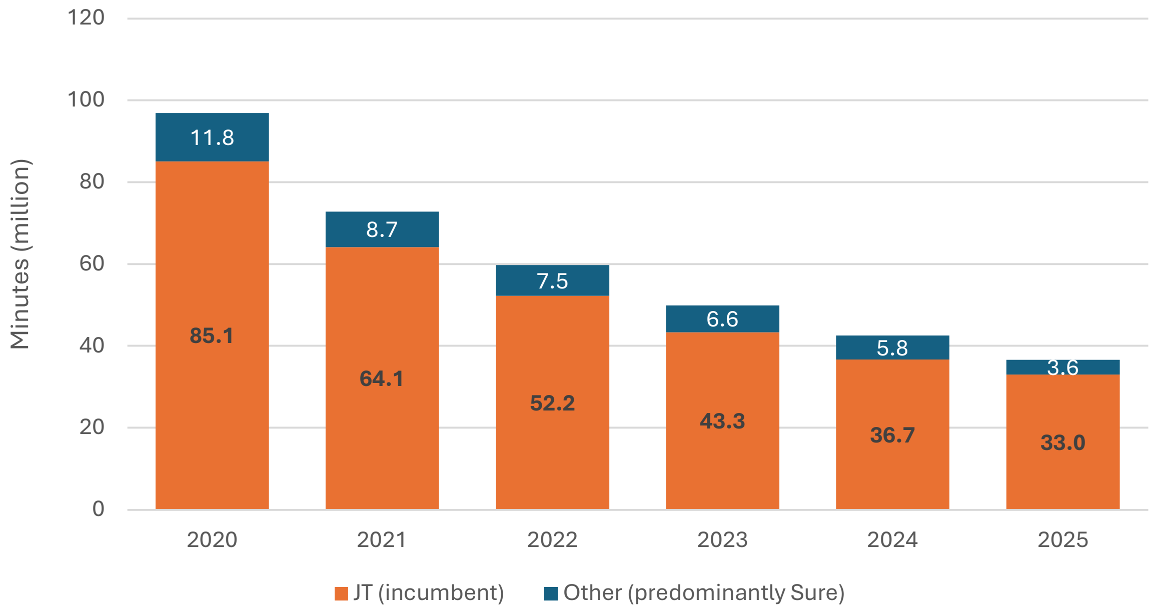


Figure 15: Number of fixed line minutes in Jersey by operator, 2020 to 2025

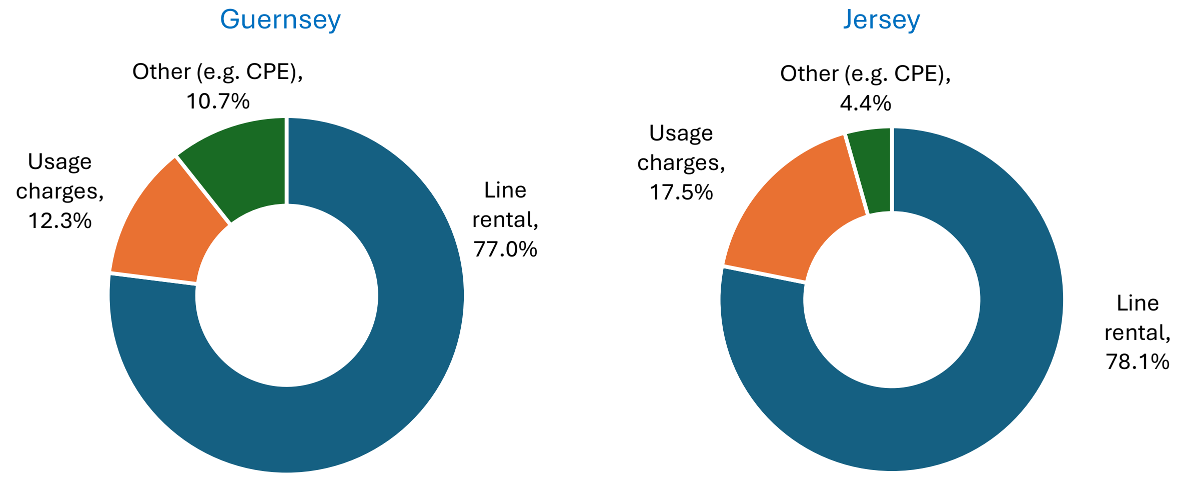


Revenues

Excluding broadband and leased line services, revenues associated with fixed networks in 2025 were £11.2m in Guernsey (£11.0m in 2024) and £13.4m in Jersey (£13.6m in 2024).

Figure 16 shows these revenue totals broken down into line rental, usage charges and other charges e.g. for customer premises equipment (CPE) and support services for each island.

Figure 16: Fixed network revenues, Guernsey and Jersey, 2025



Note: The above charts exclude broadband and leased lines

The average annual revenue per fixed line from line rental, usage charges and associated equipment and services in Guernsey in 2025 was £314.73 (£26.23 per month), showing a decrease of 9.0% compared to 2024. Excluding GST, the equivalent annual figure for 2025 in

Jersey was £266.88 (£22.24 per month); a decrease of 6.8% from 2024. Charges for services such as broadband are in addition to these (noting these are typically bundled together).

Fixed broadband market

Fixed broadband services are those delivered over physical copper connections, fibre connections or via satellite. They do not include services delivered over mobile networks.

Separate fixed broadband packages are available for residential and business/enterprise users, and most subscribers are classified as residential. However, this distinction is not always clear, as many small businesses use services designed for residential customers. In 2025, business/enterprise products accounted for 5.5% of subscriptions in Jersey (down from 5.8% in 2024) and 3.4% in Guernsey (down from 4.2% in 2024).

Subscriptions and penetration rates

Table 2 shows numbers of fixed broadband subscriptions for Guernsey and Jersey from 2020 to 2025. In 2025, fixed line broadband subscriptions in Guernsey recorded an increase of 1.1% to 27,286, while Jersey experienced a 2.0% increase to 44,750.

Table 2 – Numbers of fixed broadband subscriptions, 2020 to 2025

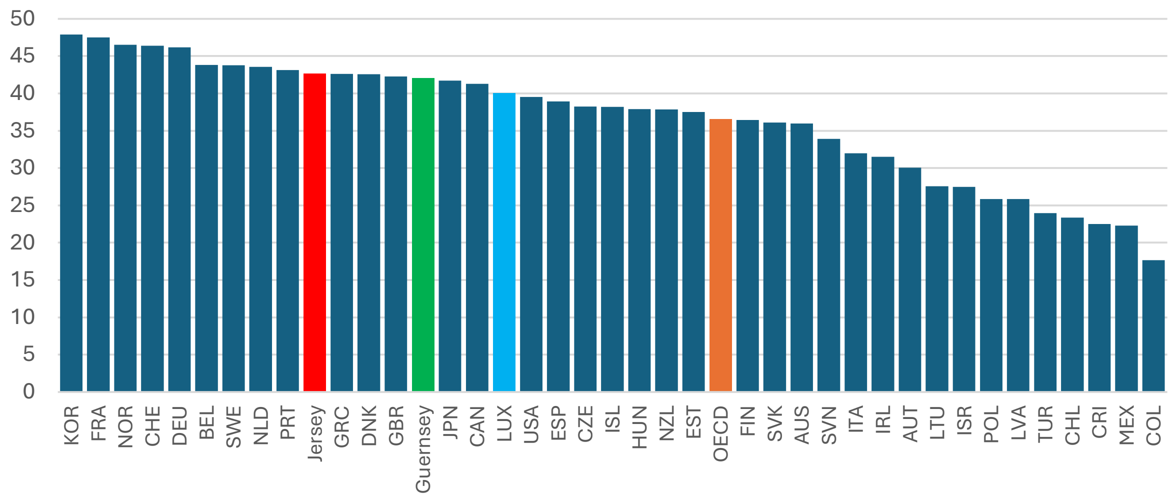
	Guernsey	**Jersey**
2020	25,336	39,699
2021	25,855	40,728
2022	26,338	42,193
2023	26,925	42,978
2024	26,975	43,856
2025	27,286	44,750

Since 2020, there has been a gradual upward trend in broadband subscriptions (excluding data only mobile) in both Islands and this has continued in 2025.

In Jersey, JT provides some subscriptions with capped data allowance: these made up 6.5% of subscriptions in the Island in 2025 compared to 7.5% in 2024. In Guernsey, all subscriptions have unlimited data allowance.

As illustrated in Figure 17, both Jersey and Guernsey have penetration rates higher than the OECD average of 36.5 subscriptions per 100 inhabitants. In 2025, Guernsey had 42.1 subscriptions per 100 inhabitants (up from 41.6 in 2024), while Jersey had 42.7 (up from 42.3 in 2024).

Figure 17: Jersey, Guernsey and OECD fixed broadband subscriptions per 100 inhabitants



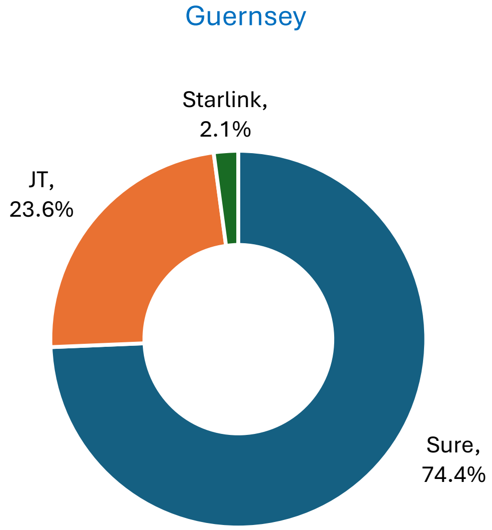
Sources: Statistics Jersey & OECD broadband statistics (Broadband statistics | OECD)

OECD data is from the latest available (December 2024)

Market shares

Figure 18 shows the retail market shares of the fixed network broadband providers in Guernsey and Jersey by numbers of subscriptions. The incumbent operators remained the largest providers in their respective home markets.

Figure 18: Fixed broadband market share by number of subscriptions, Guernsey and Jersey, 2025



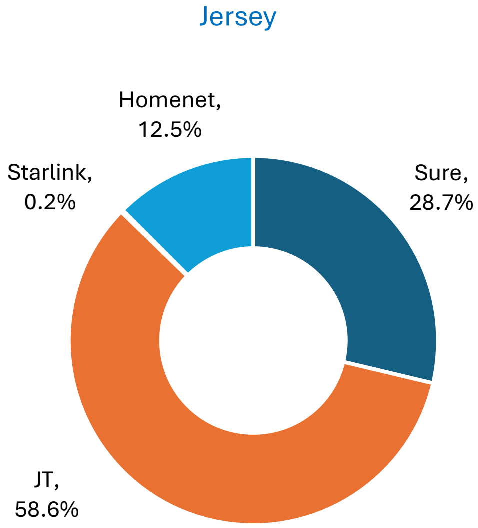


Table 3 shows historic market shares in Guernsey and Jersey between 2020 and 2025.

Table 3 – Fixed broadband market share (%) in Guernsey and Jersey, 2020 to 2025

	Guernsey			Jersey		
	Sure	JT	Other	Sure	JT	Other
2020	79	21	0	32	60	8
2021	79	21	0	31	61	8
2022	76	22	1	29	61	9
2023	73	24	3	28	61	11
2024	72	23	5	27	60	13
2025	74	24	2	29	59	13

Broadband download speeds

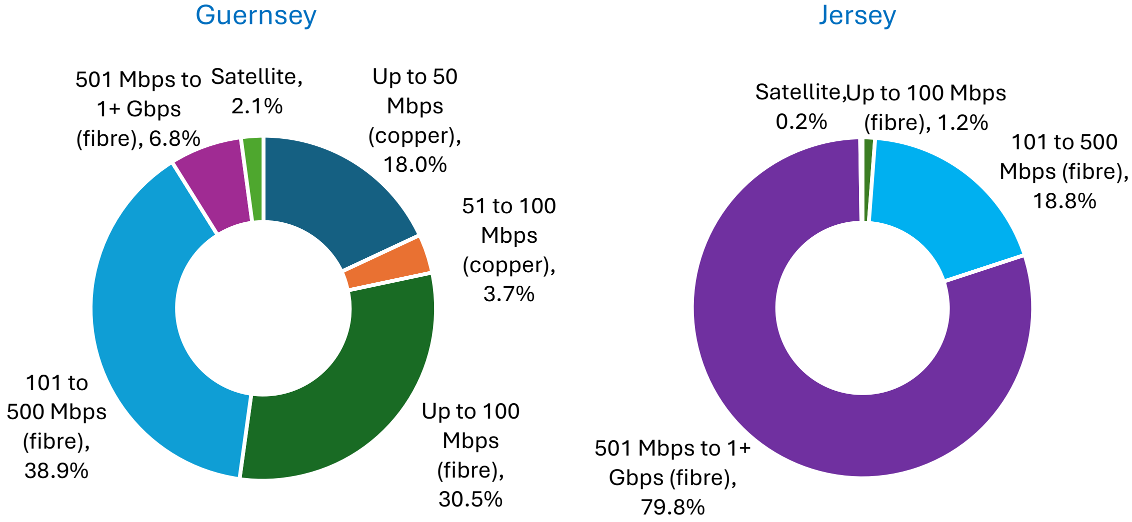
The technology and download speeds available for broadband internet access differ between the Islands.

In the past, Guernsey connections were mainly copper based, with subscribers predominantly able to access services via xDSL technologies with advertised download speeds of up to 20Mbps and up to 100Mbps. However, fibre connections have begun to be rolled out across the Island and the majority of households are now covered. In Guernsey, Sure owns all the physical lines and JT obtains services through wholesale arrangements but also has some fibre customers. Services with download speeds of up to 20Mbps are delivered using ADSL technology, while higher speeds in a range up to 100Mbps are delivered using VDSL technology. Starlink also provide a small number of services via satellite.

In Jersey, by the end of 2018, the JT network had been converted to fibre and subscribers had access to products with advertised download speeds of up to 1Gbps. JT owns the majority of the fibre connections, with other licensed operators gaining access to its network through wholesale arrangements. Homenet also provides services up to 1Gbps through its own Fibre to the Home (FTTH) network; and Starlink provides services via satellite.

Figure 19 shows the proportions of fixed network broadband subscriptions by download speed on the historically reported basis of 'up to' speeds in Guernsey and Jersey respectively.

Figure 19: Fixed broadband subscriptions by download speed, Guernsey and Jersey, 2025



In Guernsey, fibre subscriptions have increased to 76.2% in 2025 from 55.6% in 2024. The proportion of broadband subscriptions in Jersey with download speeds of over 500 Mbps was slightly higher in 2025 at 79.8% (78.5% in 2024).

Data volumes

Not all service providers were able to provide information on the volumes of data consumed by their customers. However, based on the available data, it can be estimated that the total volume of data downloaded and uploaded in 2025 by broadband subscribers in Guernsey increased by 13.7% to 146.1 million Gbytes. In Jersey, the estimated volume of data in 2025 increased by 8.6% to 246.0 million Gbytes.

On average, fixed network broadband subscribers (including mobile substitutions) in Guernsey each sent and received an average of 446 Gbytes of data per month in 2025 while subscribers in Jersey each sent and received an average of 459 Gbytes per month. The equivalent figures for 2024 were 397[10] Gbytes in Guernsey and 431 Gbytes in Jersey, demonstrating an increase (12.3% and 6.5% respectively). Jersey and Guernsey data usage in 2025 were still below the UK (583 Gbytes per month in 2025).[11]

Not all operators were able to provide a detailed breakdown of data volumes, therefore splits by total data uploaded and downloaded cannot be reported.

[10] 2024 data for Guernsey has been updated since the 2024 report was published due to updated information received from providers

[11] Connected Nations UK report 2025

Revenues

Total retail revenues in 2025 from fixed broadband services were £12.9m in Guernsey; up from £12.5m in 2024. Revenues in Jersey in 2025 have increased to £21.4m from £20.4m in 2024.

Fixed network broadband services in Guernsey were, subject to fair usage policies, generally uncapped, meaning that consumers could download and upload as much data as they wished for a fixed monthly subscription. 97.7% of revenues were derived from basic subscriptions and 2.3% from other sources such as usage above the basic subscription, any bolt-ons such as overage and out-of-bundle charges, and equipment sales.

In Jersey, some fixed network broadband services retailed by JT are subject to caps on the amount of data its customers can download, with the allowed amount depending on the monthly subscription; customers can also buy bolt-on packages for extra data and/or pay overage charges. Sure and Homenet sell subscriptions with unlimited usage, subject to fair usage policies. 97.3% of revenues in Jersey were derived from basic subscriptions and 2.7% from other sources.

Average revenue per subscription

Estimated[12] average revenue per fixed network broadband subscription in Guernsey in 2025 was £473.12 for the year (£39.43 per month). This shows an increase of 1.8% compared to 2024.

The equivalent 2025 figures in Jersey were £477.77 for the year (£39.81 per month), an increase of 2.8% compared to 2024.

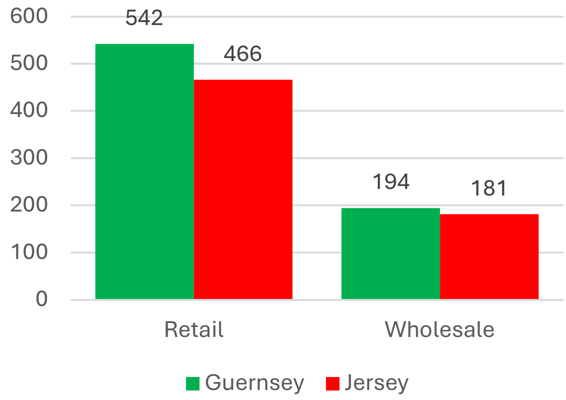
The above figures exclude revenues from associated line rental, noting these services are often bundled together.

[12] Not all operators were able to separate retail revenues derived from true fixed network broadband activities from those derived from broadband provided by fixed network substitution. It is therefore only possible to estimate the average revenues per fixed broadband subscription. Figures here as elsewhere exclude GST where relevant.

Leased line market

Leased lines (sometimes called private circuits) are private, bi-directional, symmetric telecommunications links between two or more locations. Usually used by corporate and governmental organisations, they can be used for voice or data services. Leased lines are also used by licensed operators to provide mobile network backhaul. For the purposes of this report, retail leased lines are defined as those services provided to end users, while wholesale leased lines are those services provided to other communication providers.

Figure 20: Number of retail and wholesale leased lines, 2025



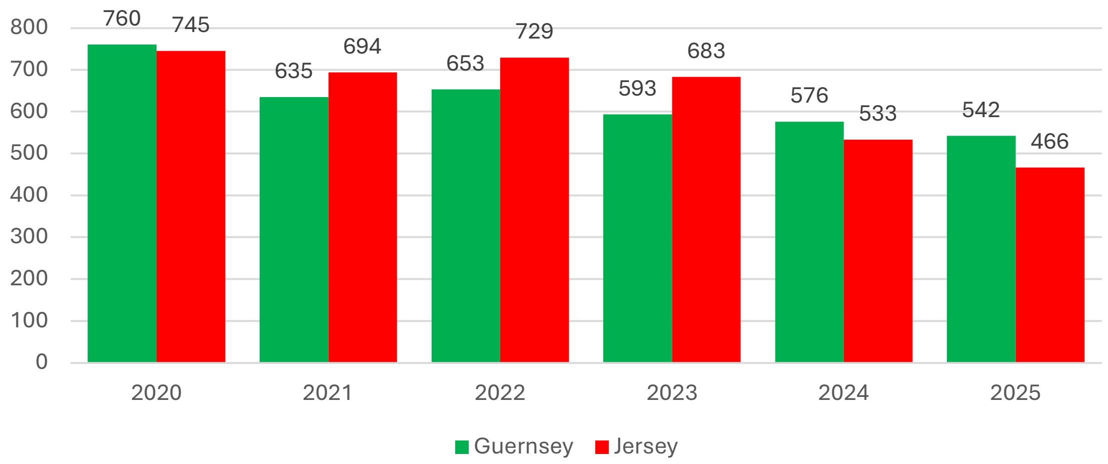
In both Jersey and Guernsey, there were more than twice as many retail leased lines as wholesale lines. The number of retail leased lines has continued to decrease in both islands: in Guernsey falling from 576 in 2024 to 542 in 2025, and from 533[13] to 466 in Jersey. Wholesale leased lines saw a slight decrease in Guernsey, decreasing from 196 in 2024 to 194 in 2025, whilst in Jersey they decreased from 211 in 2024 to 181 in 2025.

Table 4 – Numbers of leased lines by usage, 2025

	Guernsey			Jersey		
	On-island	Inter-island	Off-island	On-island	Inter-island	Off-island
Retail	465	15	62	374	18	74
Wholesale	172	0	22	123	0	58

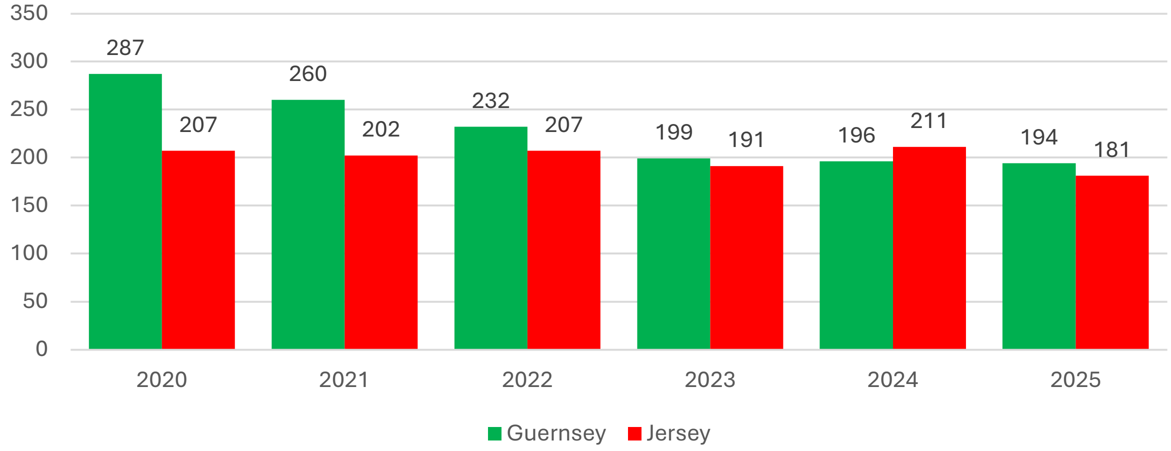
[13] 2024 data for Jersey has been updated since the 2024 report was published due to updated information received from providers

Figure 21: Number of retail leased lines, 2020 to 2025



The number of retail leased lines in both islands has been decreasing each year since 2022.

Figure 22: Number of wholesale leased lines in the Channel Islands, 2020 to 2025

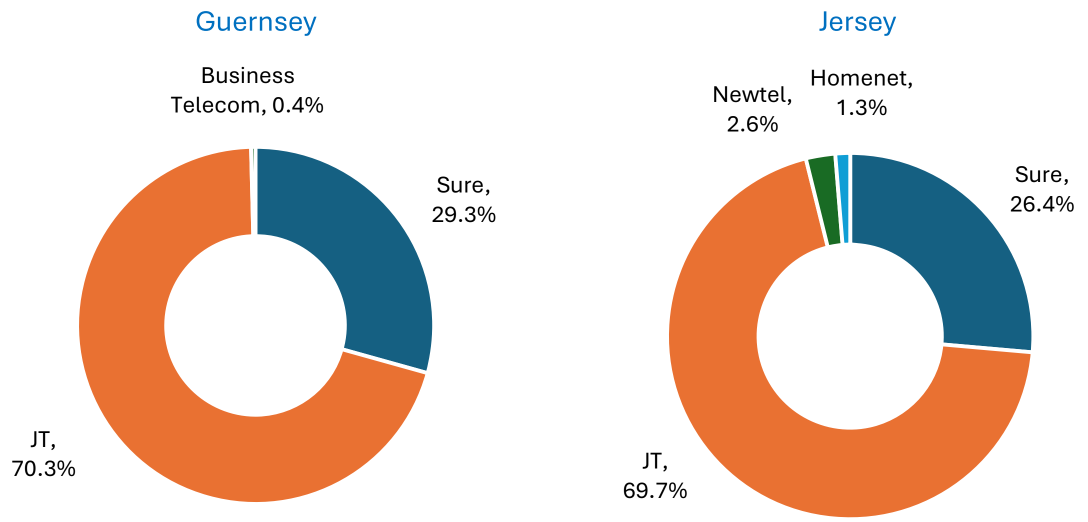


Between 2020 and 2025, Guernsey experienced a consistent decrease in values, dropping from 287 in 2020 to 194 in 2025. However, this downward trend appears to have levelled off since 2023, with only a marginal decrease from 199 to 194 in 2025. Jersey's figures had remained relatively stable until 2024 but have decreased from 211 in 2024 to 181 in 2025.

Market share by numbers of leased line subscriptions

Figure 23 shows the retail market shares of the structured leased line providers in Guernsey and Jersey respectively by numbers of leased line subscriptions.

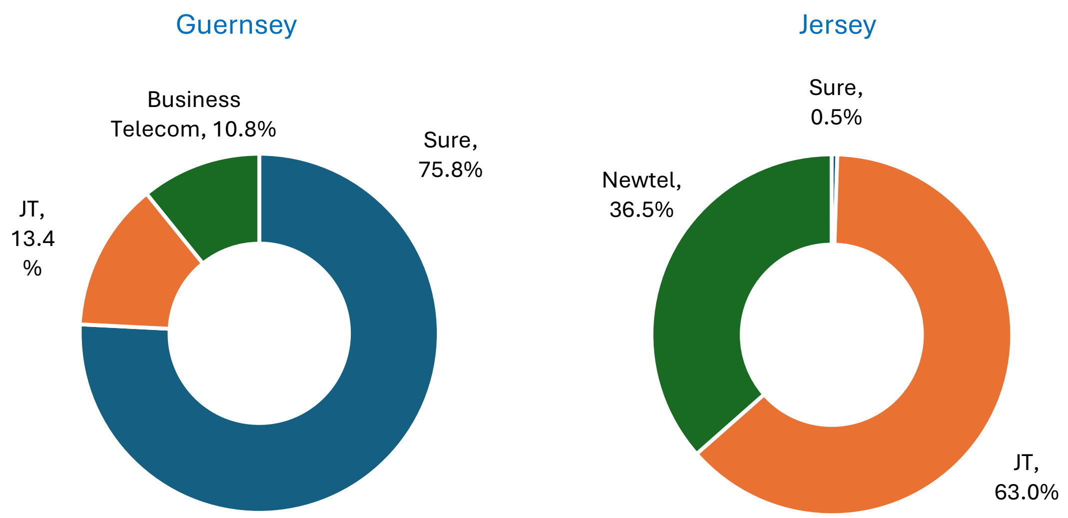
Figure 23: Retail leased line market share by number of subscriptions, Guernsey and Jersey, 2025



As in previous years, in 2025 JT was the main retail provider in both Islands with over two-thirds of the market share.

Figure 24 shows the wholesale market shares of leased line providers in Guernsey and Jersey by numbers of leased line subscriptions.

Figure 24: Wholesale leased line market share by number of subscriptions, Guernsey and Jersey, 2025



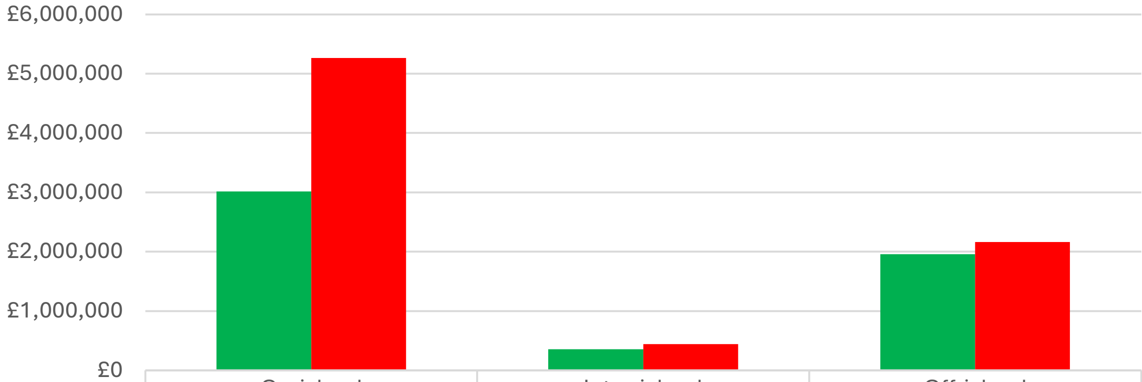
In 2025, JT was again the main wholesale provider in Jersey, while Sure was the main provider in Guernsey. Both have also gained market share in their respective islands since 2024.

Leased line revenues

Total revenue from retail leased lines in Guernsey in 2025 was £5.3m, a decrease from £6.2m in 2024, and £7.9m in Jersey in 2025, a decrease from £8.7m in 2024.

Figure 25 shows the breakdown of these totals by on-island, inter-island and off-island services.

Figure 25: Revenues from retail leased lines by activity, 2025

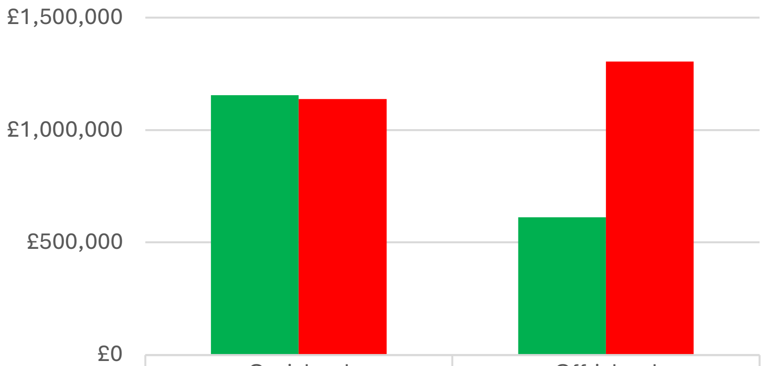


	On-island	Inter-island	Off-island
Guernsey	£3,016,833	£354,157	£1,956,727
Jersey	£5,266,724	£442,156	£2,161,726

Total revenue from wholesale leased lines in Guernsey in 2025 was £1.8m (£1.9m in 2024), and in Jersey in 2025 was £2.4m (£2.9m in 2024). On-island retail leased lines generated the highest revenue across both islands in 2025.

Figure 26 shows the breakdown of these totals by on-island and off-island services. There were no inter-island revenues declared in 2025.

Figure 26: Revenues from wholesale leased lines by activity, 2025



	On-island	Off-island
Guernsey	£1,154,060	£612,092
Jersey	£1,137,692	£1,304,483

Revenues from wholesale leased lines decreased in both islands in 2025. Off-island leased lines generated the highest revenue in Jersey, whilst on-island leased lines generated the highest revenue in Guernsey.

Mobile market

At the start of 2025, there were three Mobile Network Operators (MNO) with commercial activities in Jersey and Guernsey: Sure, JT and Airtel. Following the completion of the acquisition of Airtel, by Sure, there are two MNOs. In addition, Homenet provide data only services using the MNO networks.

In this section of the report, most Sure data relates to the combined operations of Sure and Airtel. The exception is mobile usage data (minutes, SMS and data), for which robust Airtel data was not available. Accordingly, the 2025 mobile usage figures for Sure reflect only customers on Sure tariffs as of December 2025 and exclude customers on legacy Airtel tariffs due to unavailable Airtel usage data. As a result, total market comparisons for mobile usage are not presented, although company-level comparisons remain available. In addition, as the Sure and Airtel networks continued to operate separately during the period, mobile switching data is presented separately for Airtel and Sure.

Subscriptions and penetration rates

Figure 27 shows the total number of mobile subscriptions in the Islands during the period 2020 to 2025. The figures include pre-paid (i.e. pay as you go) and post-paid (i.e. contract) subscriptions. Overall, mobile subscriptions in the Channel Islands declined slightly, with numbers stable in Guernsey but falling marginally in Jersey.

Figure 27: Number of active mobile subscriptions, 2020 to 2025

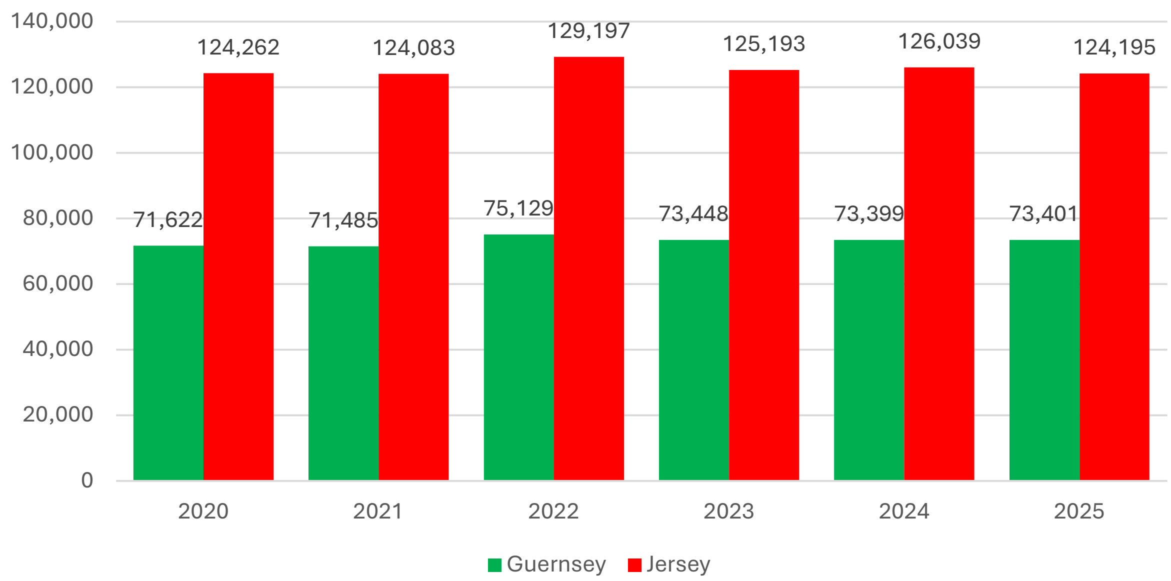


Table 5 provides a breakdown of pre-paid and post-paid mobile subscriptions in each Island over the period 2020 to 2025.

Table 5 - Pre- and post-paid mobile subscriptions, 2020 to 2025

	2020	2021	2022	2023	2024	2025
Guernsey post-paid	48,009	48,590	51,760	52,628	52,142	51,899
Guernsey pre-paid	23,613	22,895	23,369	20,820	21,257	21,502
Jersey post-paid	85,314	86,076	89,118	90,936	89,391	86,385
Jersey pre-paid	38,948	38,007	40,079	34,257	36,648	37,810

In common with many developed countries, the number of active mobile subscriptions in the Channel Islands is greater than the number of inhabitants. At the end of 2025 in Guernsey there were 113 active subscriptions per 100 inhabitants, and in Jersey there were 119 subscriptions per 100 inhabitants.

Market shares

Figure 28 shows the retail market shares of the mobile providers in Guernsey and Jersey by numbers of subscriptions, with Table 6 providing an overview of changes between 2020-2025. The incumbent operators remained the largest providers in their respective home markets.

Figure 28: Mobile market share by number of subscriptions, Guernsey and Jersey, 2025

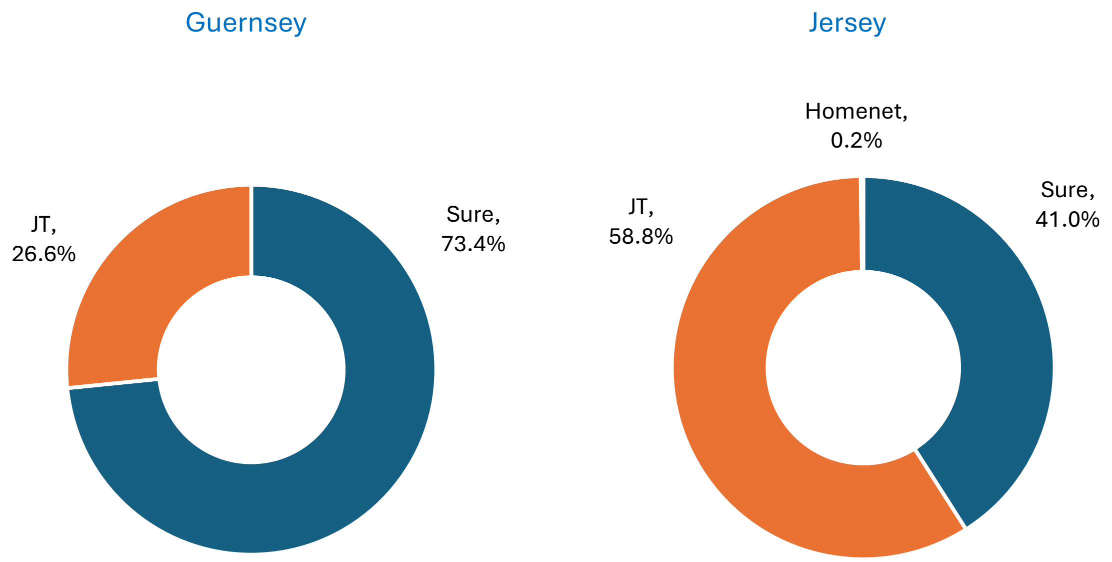


Table 6 – Mobile market share (%) of subscriptions in Guernsey and Jersey, 2020 to 2025

	Guernsey			Jersey			
	Sure	JT	Airtel	Sure	JT	Airtel	Homenet
2020	55	21	24	23	52	24	1
2021	58	20	22	23	52	24	1
2022	56	22	22	22	52	25	1
2023	59	22	19	23	53	23	1
2024	59	24	17	23	56	21	<1
2025	73	27	-	41	59	-	<1

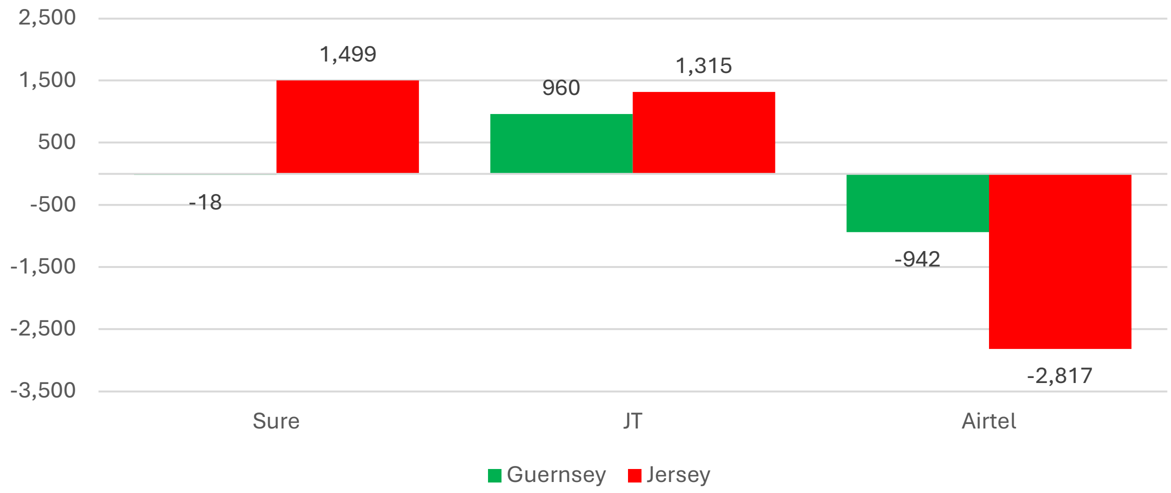
The 2025 shares highlight the impact of the acquisition of Airtel by Sure, significantly increasing Sure's market share. JT also recorded growth in both islands, with a 9.6% increase in Guernsey and a 4.1% increase in Jersey. Homenet's subscriptions continued to be very small.

Switching activity in the Guernsey and Jersey mobile markets

One measure of the competitive dynamics in the mobile markets is the extent to which consumers switch from one supplier to another. Switching is usually associated with 'porting' whereby consumers switch from one supplier to another while keeping their telephone number; i.e. 'port' their mobile telephone number from one supplier to another. In the Channel Islands, number porting is available within each island, but not between them.

On the following page, in Table 7 'porting-in' describes the number of consumers moving to a new supplier and 'porting-out' describes the number of consumers leaving their existing supplier. In Figure 29, the net change in subscribers is shown, calculated by subtracting the number of subscribers 'porting-out' from the number 'porting -in'. Airtel is included in this Figure as it was run separately from Sure during part of 2025, before being fully integrated in September of 2025,

Figure 29: Net number of consumers switching mobile service provider, 2025



Source: Porting XS MNP Channel Islands data 2025

In Jersey in 2025, Sure made a net loss of mobile consumers to JT, but made a net gain of subscribers from Airtel. In Guernsey, Sure also made a net gain of subscribers from Airtel (not taking into account the acquisition), but made a net loss of subscribers to JT.

Table 7 – Mobile number porting activity in Guernsey and Jersey, 2025

	Guernsey			Jersey		
	Sure	JT	Airtel	Sure	JT	Airtel
Port in	828	1,212	153	2,355	1,846	209
Port out	846	252	1,095	856	531	3,026
Net	-18	960	-942	1,499	1,315	-2,817

Source: Porting XS MNP Channel Islands data 2025

Table 8 shows the percentage of registered mobile numbers that switched service provider in Guernsey and Jersey from 2020 to 2025. In 2025, mobile number switching increased notably in both islands, reaching the highest levels in the five-year period. Guernsey rose to 3.0% and Jersey to 3.6%,

Table 8 – Levels of mobile number switching in Guernsey and Jersey, 2020 to 2025

% of mobile subscribers switching provider	2020	2021	2022	2023	2024	2025
Guernsey	2.3	2.8	1.8	2.1	2.0	3.0
Jersey	2.0	1.9	1.7	1.8	1.8	3.6

Source: Porting XS MNP Channel Islands data 2020 to 2025 and Industry questionnaires

In 2025, the average time required to complete a successful port between providers was 0.6 working days in both Guernsey and Jersey. Despite the increased volume of porting, both islands have shown improved porting times compared to 2024. The European Commission's Universal Service Directive requires operators to provide porting within 1 working day.

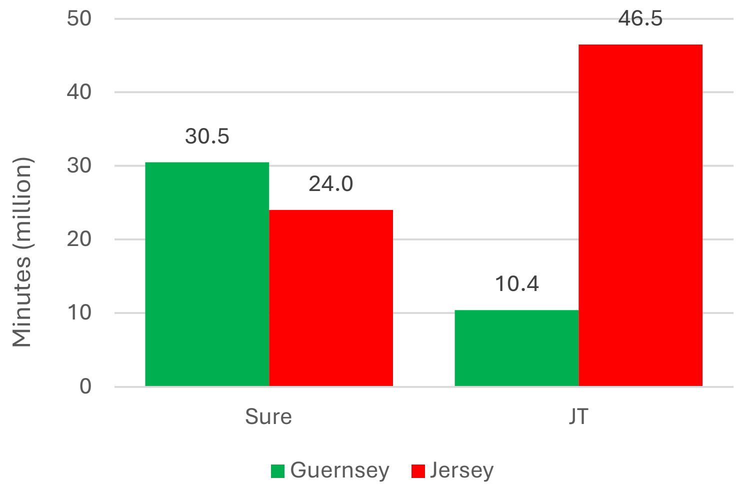
Table 9– Average porting time in Guernsey and Jersey, 2020 to 2025

Average porting time (working days)	2020	2021	2022	2023	2024	2025
Guernsey	1.1	1.3	1.4	1.1	0.9	0.6
Jersey	1.1	1.1	1.4	1.2	1.0	0.6

Mobile minutes

Figure 30 shows the total amount of mobile calls made by customers of each operator in 2025, measured in minutes and shown separately for each island. This includes traffic derived from in-roaming activities and excludes out-roaming. In-roaming is the use of mobile services by customers of non-Channel Island operators roaming on Channel Islands networks.

Figure 30: Total number of mobile minutes, 2025[14]



Based on comparable operator datasets, when compared to 2024, the total number of mobile minutes has decreased by 10.3% in Guernsey and has decreased by 11.3% in Jersey.

Table 10 shows the average number of mobile voice minutes in 2025 for pre-paid and post-paid subscriptions. On the assumption that out-roaming minutes are overwhelmingly associated with post-paid subscribers, all out-roaming voice minutes have been assigned to post paid subscribers. Out-roaming is the use of mobile services by customers of Channel Island operators roaming on networks outside of the Channel Islands. The average has continued to fall in line with the reduction in overall mobile minutes.

[14] The Sure usage data presented excludes customers on legacy Airtel tariffs due to unavailable Airtel usage data.

Table 10 – Average mobile voice minutes per pre-paid and post-paid subscription, 2025[15]

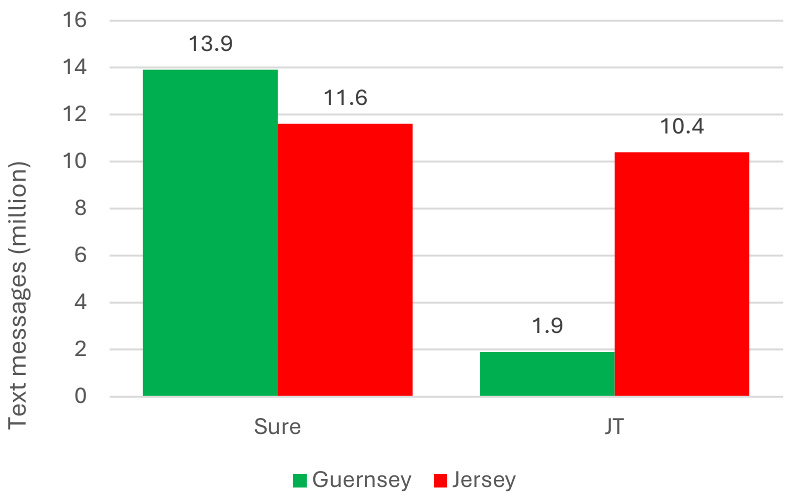
	Guernsey	Jersey
Minutes per pre-paid subscriber	250	237
Minutes per post-paid subscriber	710	764

Mobile SMS messages

Figure 31 shows how many text messages were sent by customers of each operator in each island in 2025.

These include SMS messages associated with in-roaming activities.

Figure 31: Total number of SMS messages, 2025[16]



Based on comparable operator datasets, when compared to 2024, the total number of mobile SMS messages has decreased by 9.7% in Guernsey and has decreased by 17.3% in Jersey.

Table 11 shows the average number of SMS text messages sent in 2025 for pre-paid and post-paid subscriptions. On the assumption that out-roaming text messages are overwhelmingly associated with post-paid subscribers, all out-roaming text messages have been assigned to post paid subscribers. The average has continued to fall in line with the reduction in overall SMS messages.

[15] For consistency, the average presented excludes customers on legacy Airtel tariffs due to unavailable Airtel usage data.
[16] The Sure usage data presented excludes customers on legacy Airtel tariffs due to unavailable Airtel usage data.

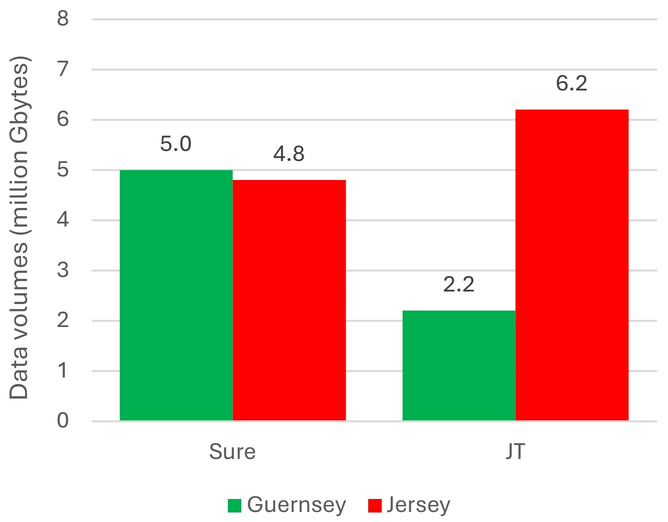
Table 11 – Average SMS text messages per pre-paid and post-paid subscription, 2025[17]

	Guernsey	Jersey
SMS messages per pre-paid subscriber	101	97
SMS messages per post-paid subscriber	119	160

Mobile data

Figure 32 shows the volume of data (in Gbytes) sent and received over each operator's network in each Island in 2025. These include data associated with pre-paid and post-paid and in-roaming activities.

Figure 32: Mobile data volumes (million Gbytes) sent and received, 2025[18]



Based on comparable operator datasets, when compared to 2024, the total mobile data volume has increased by 2.9% in Guernsey and has increased by 11.1% in Jersey.

Table 12 shows the average data volume (in Gbytes) used in 2025 per Guernsey and Jersey pre-paid and post-paid subscription. On the assumption that out-roaming data activities are overwhelmingly associated with post-paid subscribers, all out-roaming data activities have been assigned to post paid subscribers.

[17] For consistency, the average presented excludes customers on legacy Airtel tariffs due to unavailable Airtel usage data.
[18] The Sure usage data presented excludes customers on legacy Airtel tariffs due to unavailable Airtel usage data.

Table 12 – Average data volumes sent and received per pre-paid and post-paid subscription, 2025[19]

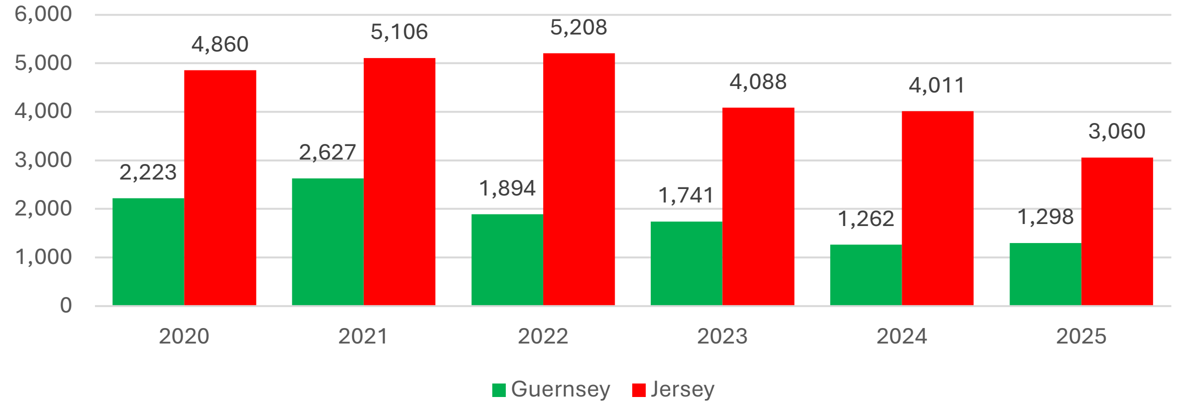
	Guernsey	Jersey
Gbytes of data per pre-paid subscriber	141.0	137.1
Gbytes of data per post-paid subscriber	92.4	85.3

As with most countries, the use of mobile for data purposes in the Channel Islands has been increasing while the number of SMS text messages has been falling.

Mobile data only SIMs

Information on data-only SIM cards types is also collected.

Figure 33: Number of data only subscriptions, 2020 to 2025



The number of mobile subscriptions for data only has been in generally in decline, following earlier peaks. In 2025, there were 1,298 mobile subscriptions for data only in Guernsey, representing an increase of 2.9% from 2024. In Jersey, there were 3,060 mobile subscriptions for data only, representing a decrease of 23.7% from 2024.

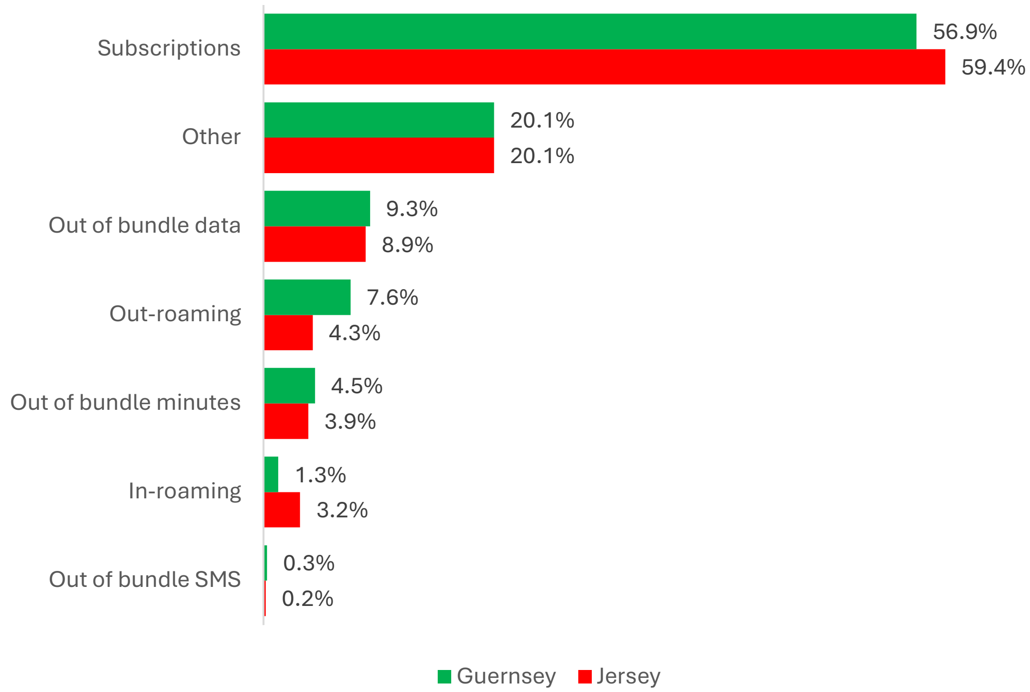
Mobile revenue

Total revenue from mobile related activities in Guernsey in 2025 was £21.3m and in Jersey £36.1m. Revenue has increased in Guernsey by 0.8%, whilst it has decreased in Jersey by 3.1%.[20]

Figure 34 provides a breakdown of the sources of mobile revenues for each island.

[19] For consistency, the average presented excludes customers on legacy Airtel tariffs due to unavailable Airtel usage data.
[20] 2024 data for both islands has been updated since the 2024 report was published due to updated information received from providers

Figure 34: Sources of mobile revenue in Guernsey and Jersey, 2025



Subscriptions include basic packages (with inclusive amounts of minutes, texts and data) and all "bolt-ons" for additional minutes, texts and data. Other revenues include items such as handsets and mobile termination charges.

Taking account of the different ways that operators structure their retail offerings, estimates of the average annual spend on usage related charges (as opposed to handsets and other ancillary services) are shown in Table 13. For this purpose, all out-roaming revenues are assumed to be associated with post-paid subscribers.

Table 13 – Annual and monthly spend per pre-paid and post-paid subscription, 2025

		Guernsey	Jersey
Pre-paid	**During 2025**	£130.09	£122.39
	Average per month	£10.84	£10.20
Post-paid	**During 2025**	£300.42	£293.39
	Average per month	£25.03	£24.45

In Guernsey, the spend per pre-paid subscriber has decreased by 1.6% compared to 2024, and the spend per post-paid subscriber has increased by 12.6%. In Jersey, the spend per pre-paid subscriber decreased by 2.1% compared to 2024, and the spend per post-paid subscriber increased by 2.8%.[21]

Out-roaming

Out-roaming is the use of mobile services by customers of Channel Island operators while roaming on networks outside of the Channel Islands.

Out-roaming traffic levels

In Table 14, out-roaming call minutes relate to calls made and received by the mobile customers of Channel Island operators while roaming on networks outside the Channel Islands. Similarly, out-roaming SMS texts are those sent and received by Channel Island customers while using non-Channel Island networks and out-roaming data is data both sent and received by Channel Island customers while using non-Channel Island networks.

Table 14 – Out-roaming minutes, SMS texts and data volumes, 2025[22]

	Guernsey	Jersey
Minutes	920,574	1,893,222
SMS texts	229,048	463,702
Data (Gbytes)	153,343	623,469

Due to data-availability issues, the 2025 outbound roaming usage data cannot be directly compared with data from previous years.

[21] 2024 data for post-paid revenue in Jersey has been updated since the 2024 report was published due to updated information received from providers

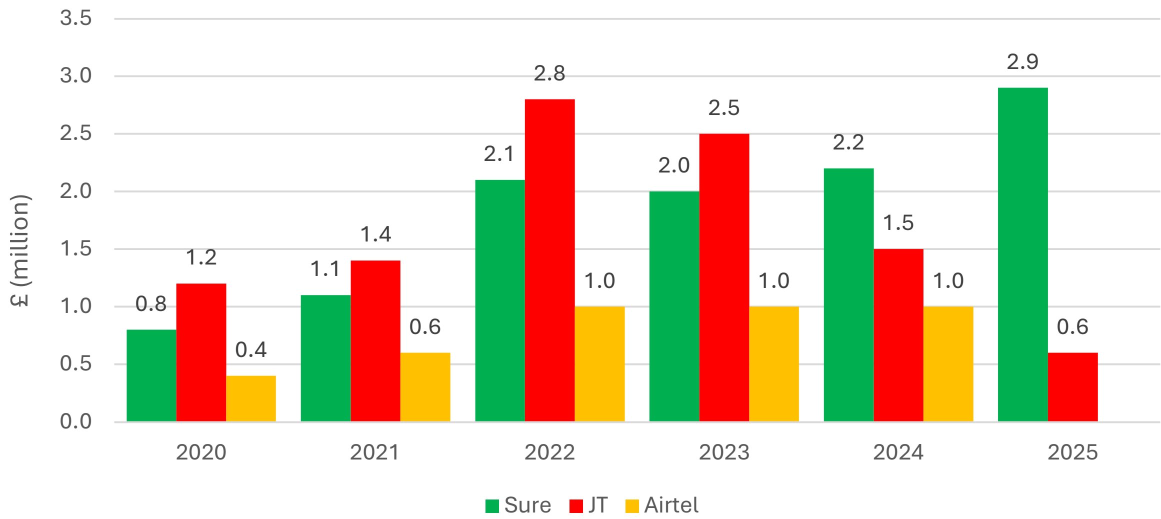
[22] The usage estimates presented exclude customers on legacy Airtel tariffs due to unavailable Airtel usage data.

Out-roaming revenues

In 2025, operators in the Channel Islands generated total revenues of £3.4m from out-roaming activities (compared to £4.6m in 2024): 6.2% of total mobile revenue (excluding in-roaming revenues), representing a decrease from 8.4% in 2024.

Figure 35 shows total out-roaming revenues in the period 2020 to 2025, combining Guernsey and Jersey.

Figure 35: Total out-roaming revenues, 2020 to 2025



Total out-roaming revenues have been decreasing in the Channel Islands since 2022 and further decreased by 25.7% in 2025.

In-roaming

In-roaming is the use of mobile services by customers of operators outside of the Channel Islands while roaming on networks within the Channel Islands.

In-roaming traffic levels

In Table 15, in-roaming call minutes relate to calls made and received by the mobile customers of non-Channel Island operators roaming on networks within the Channel Islands. Similarly, in-roaming SMS texts are those sent and received, and in-roaming data is data both sent and received by customers of non-Channel Island networks roaming on Channel Island networks.

Table 15 – In-roaming minutes, SMS texts and data volumes in the Channel Islands, 2025[23]

	Guernsey	Jersey
Minutes	4,996,165	9,083,101
SMS texts	8,787,030	7,634,064
Data (Gbytes)	530,800	1,221,415

[23] The usage estimates presented exclude usage on the Airtel network due to unavailable Airtel usage data.

Due to data-availability issues, the 2025 in-roaming usage data cannot be directly compared with data from previous years.

Not all operators were able to provide data on revenues generated from in-roaming activities, therefore total revenues are not reported in this year's report.

Notes

Inhabitants

The number of inhabitants of the Islands is used to standardise various metrics throughout the report. The numbers are as follows:

Guernsey	64,781 estimated on 31st December 2023[24]
Jersey	104,540 estimated on 31st December 2024

Glossary of terms

ADSL (Asymmetric Digital Subscriber Line) - A broadband technology that provides internet access over traditional copper telephone lines. "Asymmetric" reflecting that the download speed is faster than the upload speed, which suits typical home internet use such as browsing, streaming and downloading.

Broadband connection - active high-speed Internet access connection, provided by either wired or wireless delivery technologies, which could be provided with other fixed or mobile services.

CPE (Customer Premises Equipment) – Equipment deployed at a customer premises for the purposes of enabling access to a connectivity service.

Data-only SIM – A mobile SIM sold and configured solely for the purpose of data transmission over a mobile network.

DWDM (Dense Wavelength Division Multiplexing) – A transmission technology used in fibre-optic networks where different wavelengths are used to establish distinct logical connections or channels within a single fibre, so increasing the bandwidth the fibre can accommodate.

Fair usage policy – A policy generally implemented by Providers of unlimited services setting out actions that may be taken if a subscriber is considered to be excessively using the service.

Fixed calls - calls billed as part of a monthly subscription allowance and billed separately (when charged per minute) of all outgoing calls originating on a fixed network in the Channel Islands during the year, to all destinations i.e., Channel Islands, international, non-geographic, fixed and mobile.

Fixed connection – active telephone line (PSTN) retailed by a telecoms provider, identified by having a fixed line telephone number (area code + 6-digit local number) plus fixed wireless connections which may or may not have an associated telephone number.

FTTH / FTTP (Fibre to the Home / Premise) – A description of a network where fibre-optic cable is delivered all the way to a subscribers home or premises, replacing traditional copper networks and enabling the delivery of high bandwidth connectivity services.

Full-time equivalent / FTE – A unit of measure used to calculate the workload to make full and part time employees and so the resource effort or deployment comparable.

[24] A more recent update to Guernsey's population estimate was not available at the time or writing

GB / Gbyte / Gigabyte – A measure of stored data volume generally used as a measure for transferred data volume equivalent to 1,000 or 1,024 MB.

Gbps / Gbit/s – A measure of service throughput or bandwidth in bits per second, Giga being 1 billion, so 1,000,000,000 bits per second.

GCRA (Guernsey Competition and Regulatory Authority) – Responsible for regulating the telecoms, postal and electricity sectors in Guernsey and for the administration and enforcement of the Guernsey competition law.

GST (Goods and Services Tax) – An indirect tax applicable to the purchase of goods and services implemented in multiple countries globally.

In-roaming - refers to the use of mobile services by customers of operators outside of the Channel Islands while roaming on networks within the Channel Islands.

JCRA (Jersey Competition Regulatory Authority) - Responsible for promoting competition in the supply of goods and services in Jersey, together with the economic regulation of the telecoms, ports and postal sectors in Jersey.

Leased Line – A fixed network communications service where a customer is provided with an assured bandwidth connection between two points or for access to the internet.

MB / Mbyte / Megabyte - A measure of stored data volume generally used as a measure for transferred data volume equivalent to 1,000 or 1,024 KB.

Mbps / Mbit/s - A measure of service throughput or bandwidth in bits per second, Mega being 1 million, so 1,000,000 bits per second.

MNO (Mobile Network Operator) – A provider of mobile telecoms services that also operates its own mobile network.

Mobile connection – mobile phone retail connection on a telecoms operator’s network with a mobile telephone number that has been active within the previous 90 days.

Nominal terms – The price of a service or item that is considered or compared as an absolute value rather than adjusting for actual or real inflation over time.

Out-roaming - refers to the use of mobile services by customers of Channel Island operators while roaming on networks outside of the Channel Islands.

OECD (Organisation for Economic Co-operation and Development) – An intergovernmental organisation with multiple functions related to the economy including gathering and developing evidence to support public policy.

Penetration Rate – A measure of service adoption within a population comparing the total potential market with those consumers or subscribers that make use of the service.

Pre-paid – A reference to pre-paying for a service to be granted access to it, such as Pay as You Go (PAYG) mobile services.

Post-paid – A reference to paying for a service based on historical usage, typically based on a monthly billing cycle.

Porting / port-in / port-out – Moving of a number associated with a telecoms service from one provider to another. From the context of the provider; a port-in being the move of number for a customer joining the service that they wish to retain whereas a port-out is where a customer wishes to move their number to another provider.

PSTN (Public Switch Telephone Network) - A reference to the collection of interconnected voice-oriented public telephone networks provided by operators in jurisdictions that enable users to contact one another based on phone numbers. Often used as a reference to the historic or legacy systems using circuit switched copper-based technologies.

Retail – The provision of a service to an end customer or subscriber.

Roaming – the practice of using a mobile phone on another operator's network.

Subscription - individual telephone number or connection, whether fixed or mobile. It is important to bear in mind that it does not apply to an individual; a person or a business may use a number of connections and telephone numbers each of which counts as one subscription.

SIM (Subscriber Identity Module) - A smart card used extensively in mobile network as a method for holding key information and a unique identifier for a subscriber when connected to a network.

SMS (Short Message Service) - A service/technology that allows users to send text messages over voice-centric mobile networks.

Wholesale – The provision of a service to another provider or intermediary to be used as a component of or re-sold as a retail service.

WLR (Wholesale Line Rental) - The provision of a wholesale service by the incumbent network operator, in Jersey JT via FTTP, to allow competing operators to offer equivalent voice service to consumers.

VDSL (Very-high-bit-rate Digital Subscriber Line) – A broadband technology which a successor to ADSL, offering increased throughput using copper telephone lines.

Appendix

Off-Island links

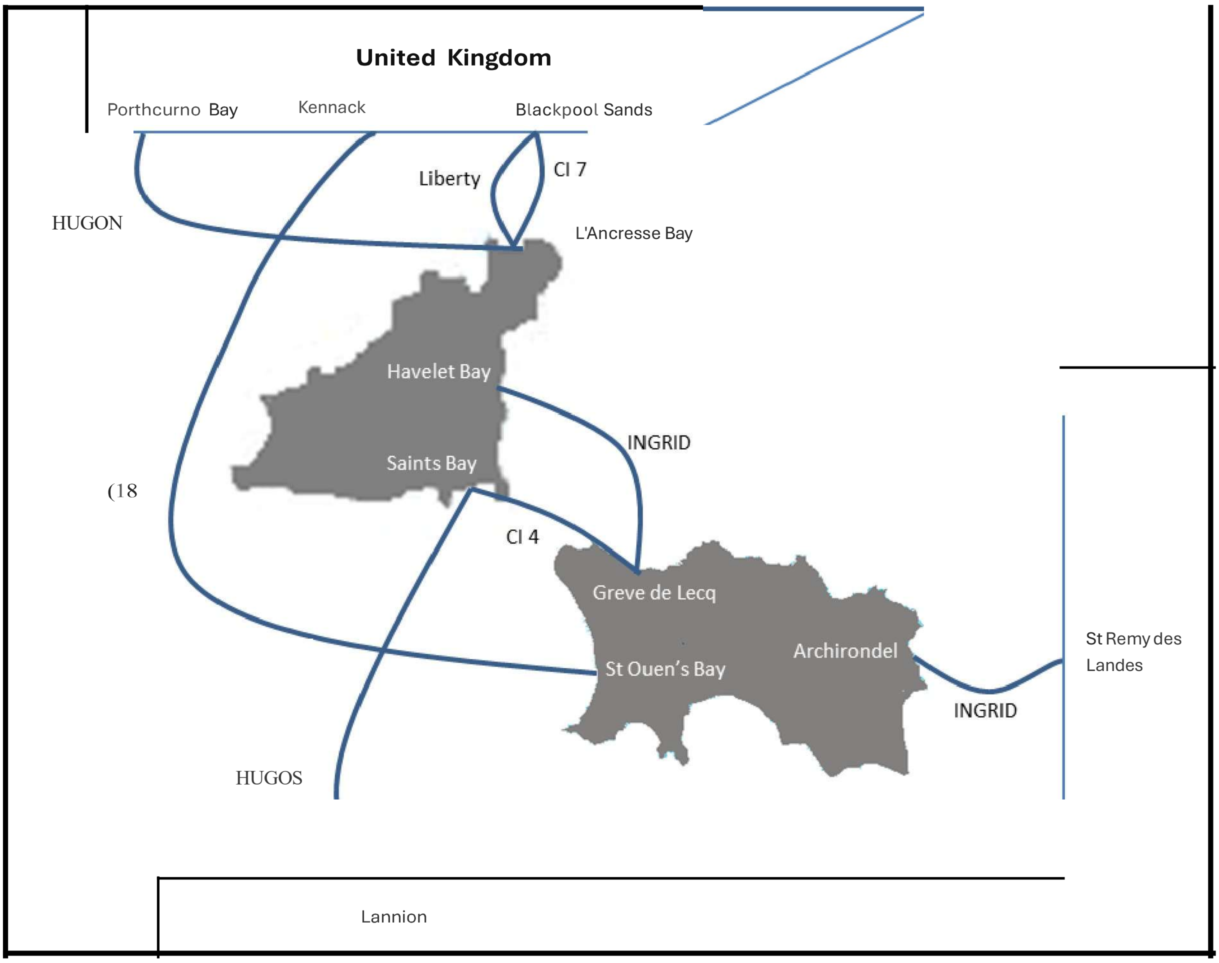
Off-island links are an important part of the telecoms infrastructure for Guernsey and Jersey, ensuring connectivity with the UK and Europe, and wider world. As part of this report the status of the off-island links is monitored and reported on to help ensure transparency about this important area.

Cable dispositions

Jersey and Guernsey have multiple submarine cables carrying voice, data and internet traffic between the Islands and to the U.K. and France. The existence of multiple routes for the transmission of information gives resilience, with different possibilities for the routing of traffic.

Not only are there multiple connections with the U.K. and France, but the four cables connecting the Channel Islands and the U.K. have three different landing points. The cables to France also have different termination points. Figure 36 gives a representation of the geographic distribution of cables and shows the multiple routes possible for traffic between Islands and outside of Guernsey and Jersey.

Figure 36: Schematic representation of cable links (excluding UK to France)



Source: Industry questionnaires and various public sources

Cable capacities and utilisation

Modern systems for the transmission of information allow large amounts of data to be passed over fibre-optic cables. Dense Wavelength Division Multiplexing (DWDM) technology allows the transmission of multiple wavelengths over the same fibre strand, thus making the potential cable capacity extremely large. Depending on the DWDM equipment fitted to the cable each wavelength can support very high bandwidths with current technology supporting up to 800Gbit/s whilst 100Gbit/s is commonly deployed. Multiple fibres are present in each cable.

The management of traffic over cables is dynamic, and the amount of traffic is not measured in the same way by all operators, however the number of wavelengths in use and the information with which we have been provided makes clear that capacity is well in excess of usage at peak times. It is also clear that the re-routing of traffic in the event of damage to individual or even multiple cables is entirely achievable, as was demonstrated in 2016 when more than one cable to Jersey was severed in a marine incident but there was no significant impact on the Island's communications traffic as a result of effective co-operation between operators.