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# UK BROADBAND FACTSHEET
## Q1 2014

Checkout last quarters major news online...

▶ OFCOM CLARIFIES RIGHTS OF CONSUMERS WITH RESPECT TO MID-CONTRACT PRICE RISES

▶ BT GROUP ANNOUNCES FURTHER £50M OF COMMERCIAL INVESTMENT FOR BROADBAND IN CITIES

▶ COUNTIES SUCH AS SUFFOLK START PLANNING FOR 95% SUPERFAST COVERAGE TARGET

▶ GIGABIT PROVIDER HYPEROPTIC ANNOUNCES EXPANSION TO READING, BRISTOL AND CARDIFF

▶ BT, SKY AND TALKTALK ALL NOW OFFER NETWORK LEVEL PARENTAL CONTROLS

▶ SELF-INSTALL FOR FTTC BROADBAND TO MAKE IT EASIER TO GET IT INSTALLED

## Inside...

# Projection of UK broadband speeds in Summer 2015
## Source: thinkbroadband analysis of technological capabilities and local loop lengths
### Revised: Summer 2013

## Technology mix across UK

5% have option of FTTP via Openreach
2.5% have option of FTTP/B via Altnet
90% have option of FTTC via Openreach
50% have option of FTTN via Virgin Media
100% access to ADSL2+ or USC Alternative

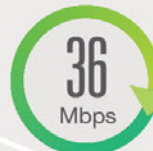Many elect to remain on ADSL type services due to price/contracts

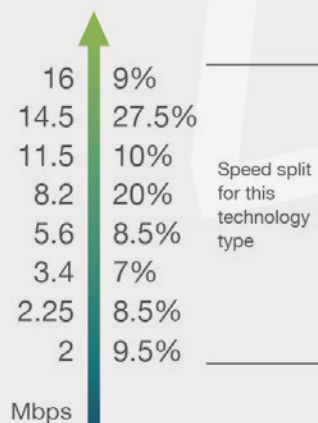Once coverage and popularity of 4g is clear it will be added to the projection.
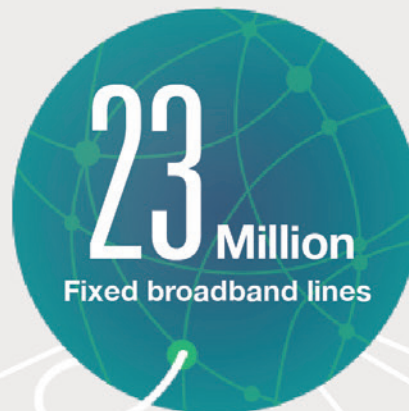
**23 Million**
Fixed broadband lines

Figure of 23 million fixed broadband lines allows for growth of 2.7 million lines in next three years

**Peak speed**
30 Mbps

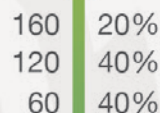**Off peak speed**
36 Mbps

1Gbps | 5%

Speed increasing

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**13.7 Million**
### ADSL2+ and USC services*
(Universal Service Commitment)

Estimates revised down from a peak time speed of 37 Mbps (off peak 45 Mbps) to reflect decrease in FTTP roll-out activity and focus on consumers for lower priced packages

| Mbps | Speed split for this technology type |
|------|------|
| 16   | 9%   |
| 14.5 | 27.5% |
| 11.5 | 10%  |
| 8.2  | 20%  |
| 5.6  | 8.5% |
| 3.4  | 7%   |
| 2.25 | 8.5% |
| 2    | 9.5% |

Mbps

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**4.5 Million**
### Virgin Media

| 160 | 20% |
|-----|-----|
| 120 | 40% |
| 60  | 40% |

Mbps

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**4.1 Million**
### Openreach FTTC

| 65 | 25% |
|----|-----|
| 45 | 5%  |
| 42 | 15% |
| 38 | 15% |
| 35 | 10% |
| 32 | 5%  |
| 28 | 5%  |
| 25 | 5%  |
| 24 | 5%  |
| 17 | 5%  |
| 15 | 5%  |
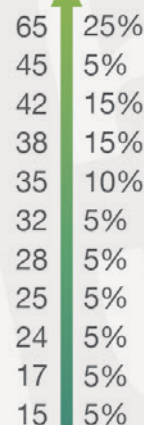
Mbps

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**0.2 M**
### Open-reach FTTP

| 330 | 5%  |
|-----|-----|
| 220 | 30% |
| 110 | 65% |

Mbps

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**0.2 M**
### Altnet FTTP/B

| 200 | 30% |
|-----|-----|
| 100 | 65% |

Mbps

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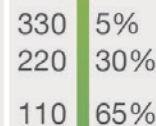
# Broadband market share
Source: Providers' Quarterly Results to December 2013

EE **3.3**%

Others **2.8**%

TalkTalk **18.9**%

BT **31.8**%
Includes ~700k Plusnet subscribers

Virgin media **20.2**%

sky **23**%
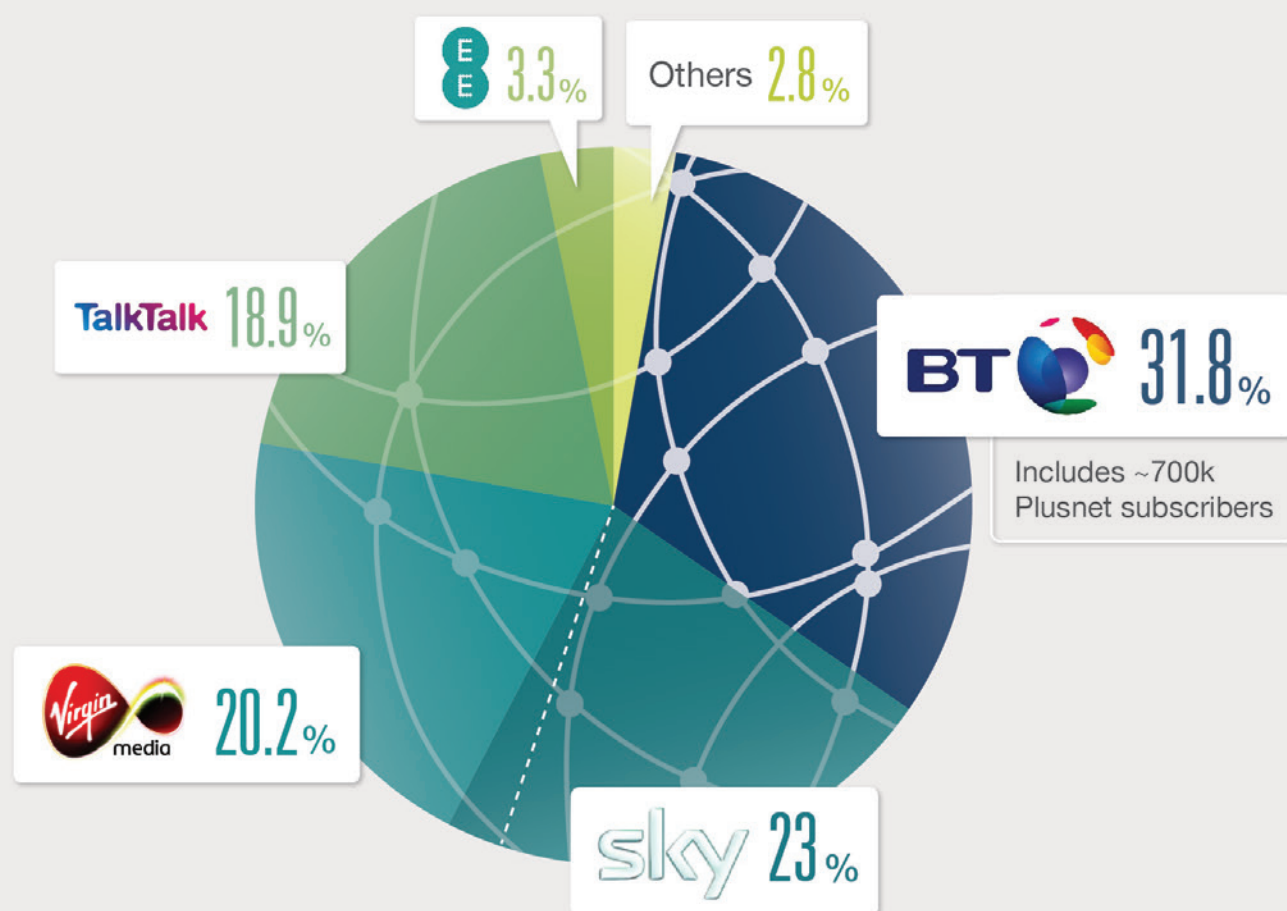
# Broadband subscriber numbers (millions)
Source: Financial results for included companies

| | 2011 | | 2012 | | | | 2013 | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| | SEP | DEC | MAR | JUL | SEP | DEC | MAR | JUL | SEP | DEC | |
| BT | 6.00 | 6.10 | 6.28 | 6.36 | 6.44 | 6.56 | 6.69 | 6.78 | 6.94 | 7.09 | |
| Sky | 3.49 | 3.84 | 3.86 | 4.00 | 4.10 | 4.20 | 4.39 | 4.91 | 5.02 | 5.13 | |
| Virgin Media | 4.33 | 4.36 | 4.38 | 4.38 | 4.41 | 4.47 | 4.49 | 4.47 | 4.49 | 4.51 | |
| TalkTalk | 4.13 | 4.08 | 4.07 | 4.05 | 4.04 | 4.05 | 4.06 | 4.07 | 4.08 | 4.19 | |
| EE/Orange | 0.71 | 0.71 | 0.71 | 0.71 | 0.72 | 0.70 | 0.69 | 0.70 | 0.71 | 0.73 | |

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## Total fixed broadband connections
2011-2014, Source: Point Topic, Ofcom, Providers

**Q4, 2011**

**20.7** Million

**Q3, 2012**

**21.3** Million

**Q1, 2013**

**21.7** Million

**Q1, 2014**

**22.3** Million

**Q4, 2011**

5 10

**7.6** Mbps

20

30

50

**Q2, 2012**

5 10

**9.1** Mbps

20

30

50

**Q2, 2013**

5 10

**14.7** Mbps

20

30

50

**Average broadband speed**
(UK measured)
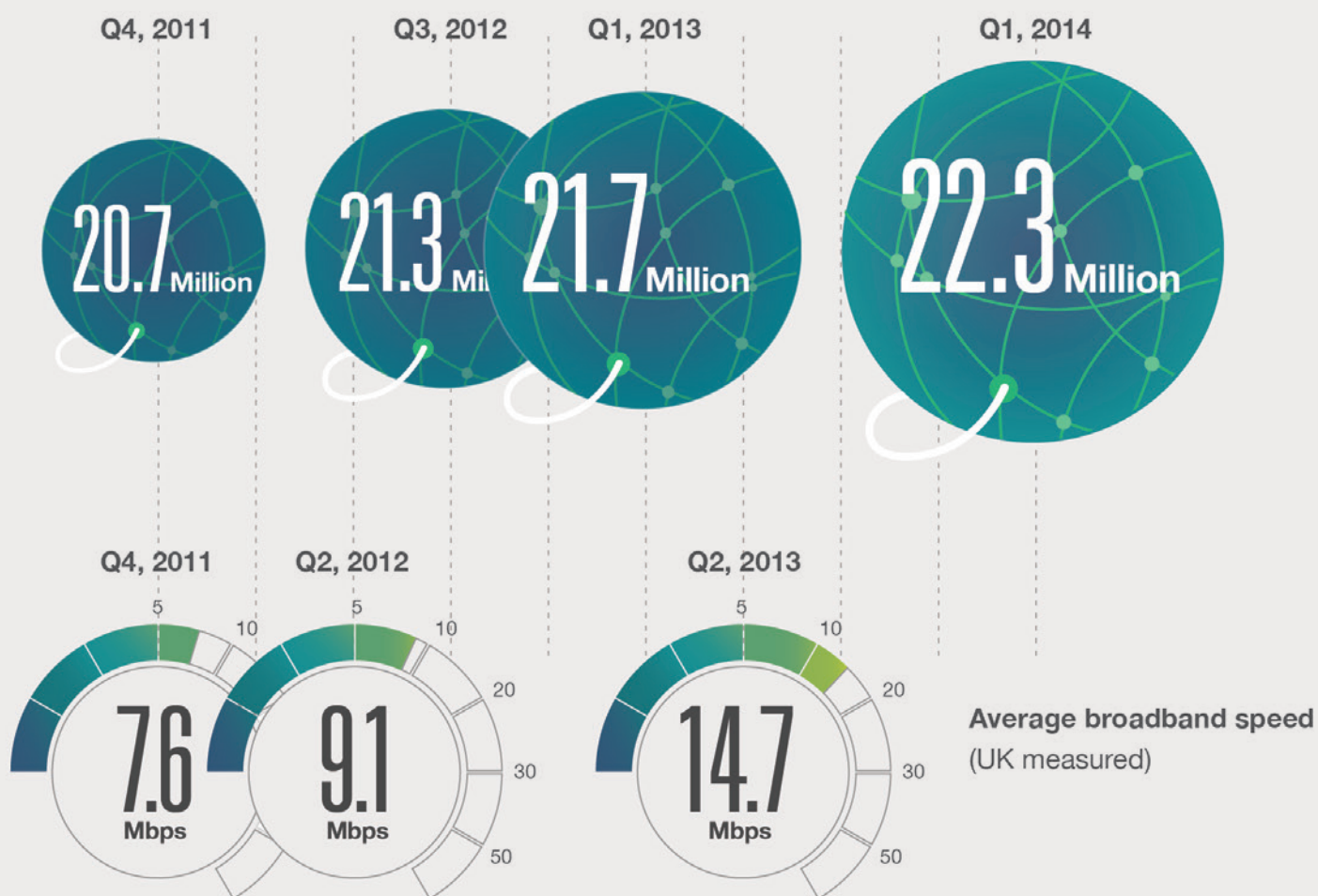
## Broadband speeds
2013, Source: Ofcom

~**57**% BT Openreach

~**32**%

~**48**% Virgin Media
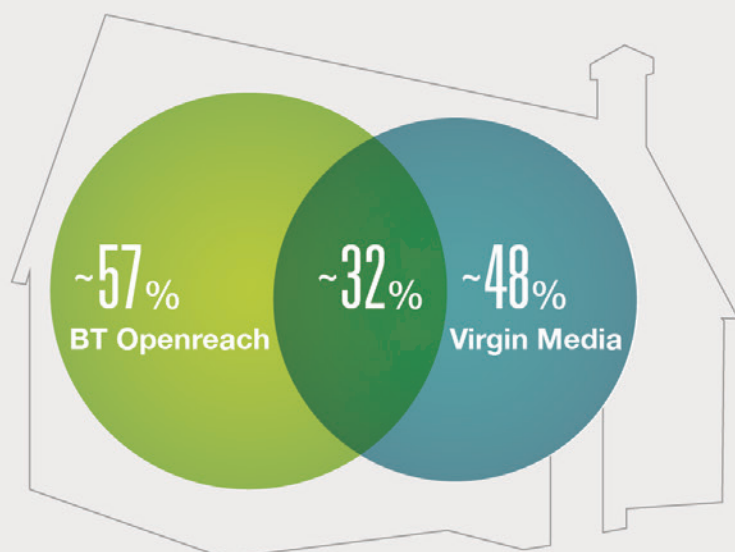
**73**%

**Total UK households
with access to
superfast
broadband**

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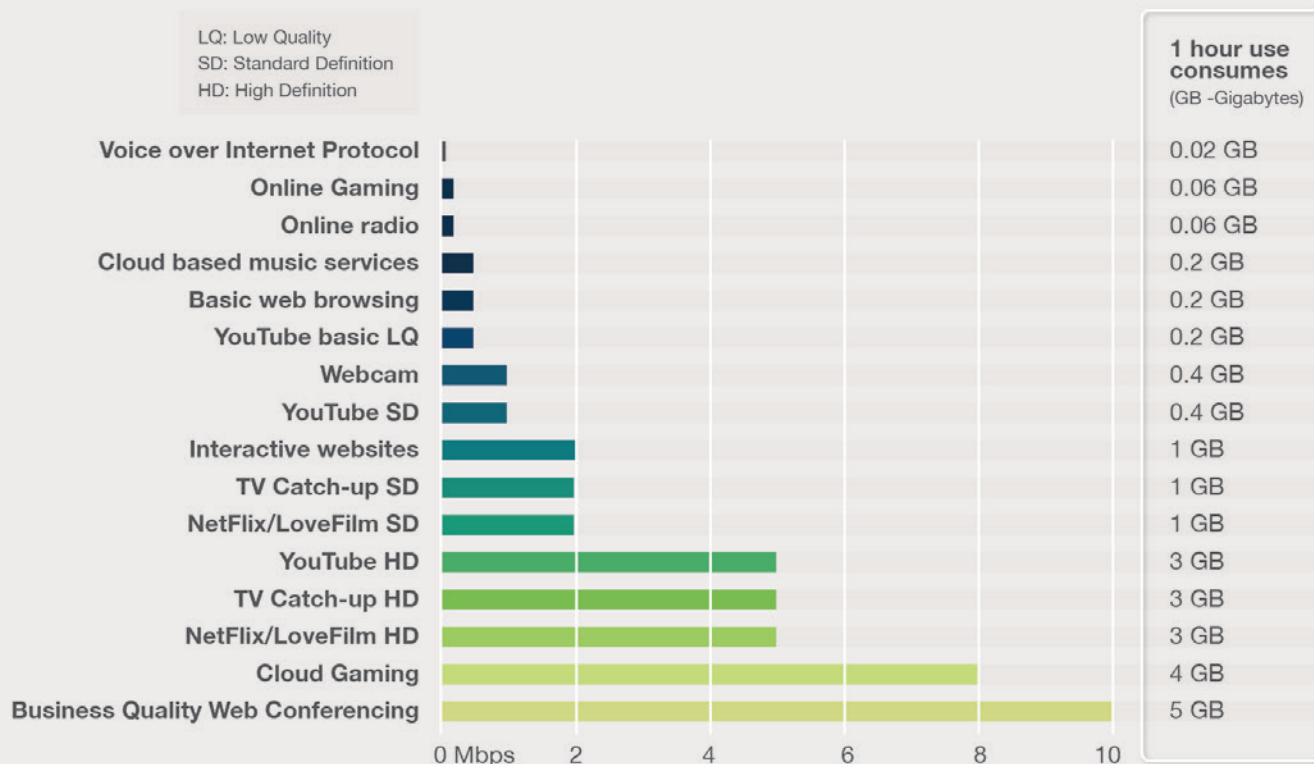# Broadband connections what are they good for?
Source: thinkbroadband.com

LQ: Low Quality
SD: Standard Definition
HD: High Definition

| Activity | Speed (Mbps) | 1 hour use consumes (GB - Gigabytes) |
|---|---|---|
| Voice over Internet Protocol | | 0.02 GB |
| Online Gaming | | 0.06 GB |
| Online radio | | 0.06 GB |
| Cloud based music services | | 0.2 GB |
| Basic web browsing | | 0.2 GB |
| YouTube basic LQ | | 0.2 GB |
| Webcam | | 0.4 GB |
| YouTube SD | | 0.4 GB |
| Interactive websites | | 1 GB |
| TV Catch-up SD | | 1 GB |
| NetFlix/LoveFilm SD | | 1 GB |
| YouTube HD | | 3 GB |
| TV Catch-up HD | | 3 GB |
| NetFlix/LoveFilm HD | | 3 GB |
| Cloud Gaming | | 4 GB |
| Business Quality Web Conferencing | | 5 GB |

0 Mbps    2    4    6    8    10

## In 90 minutes how much of a film will have downloaded...
(HD movie purchase using iTunes, XBox 360 or PS3 stores)

| 0.5 Mbps | 2 Mbps | 7 Mbps |
|---|---|---|
| 4% | 16% | 60% |

| 10 Mbps | 20 Mbps | 40 Mbps |
|---|---|---|
| 100% | 200% | 400% |

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## Rural areas vs...
villages, hamlets, open countryside

## Semi urban...
small towns 2,000 - 100,000

## Urban
town / City population > 100,000

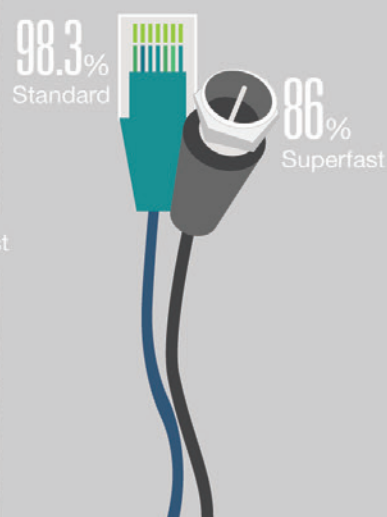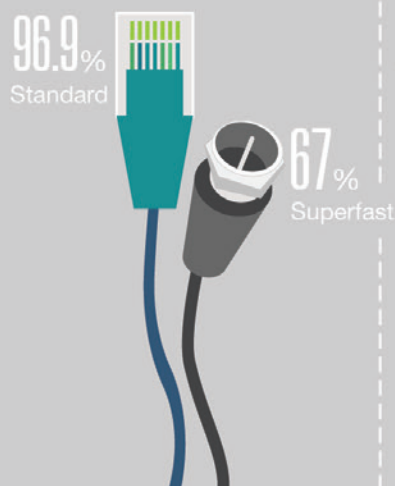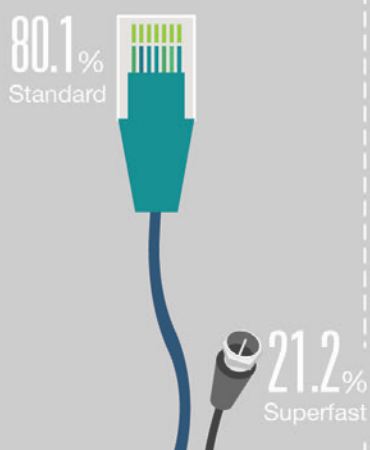**UK Population**
Source: Ofcom

14%

51%

35%

**Standard & Superfast Broadband Availability**
Source: Ofcom 2013

**80.1%** Standard

**21.2%** Superfast

**96.9%** Standard

**67%** Superfast

**98.3%** Standard

**86%** Superfast

**Average speed of connections...**
July 2013
Source: Ofcom

5 10 20 30 50 100

**9.9** Mbps

5 10 20 30 50 100

**17.9** Mbps

5 10 20 30 50 100

**26.4** Mbps
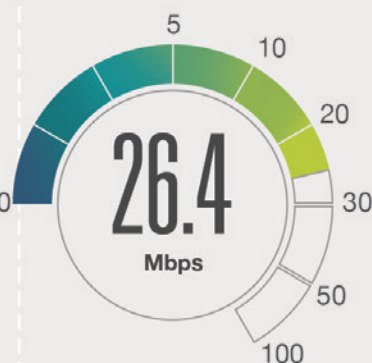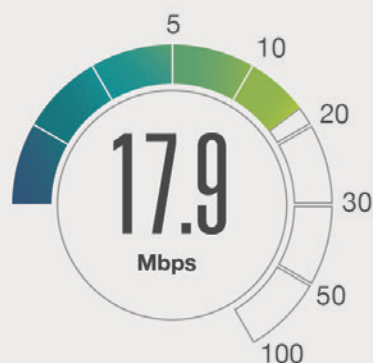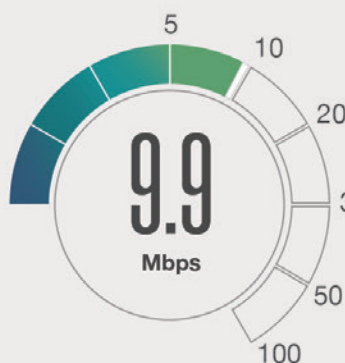
# Reagional UK Broadband speeds
Source: thinkbroadband.com speed test results January 2014

**Scotland**
▼8.1 ▲0.8

▼ Average **download** rate Mbps
▲ Average **upload** rate Mbps

**Northern Ireland**
▼13.9 ▲1.6

**North East**
▼13.3 ▲1.1

**North West**
▼12.2 ▲1

**Yorkshire & Humber**
▼10.6 ▲0.9

**East Midlands**
▼11.5 ▲1

**Wales**
▼6.6 ▲0.8

**West Midlands**
▼11.9 ▲1

**East**
▼8.8 ▲0.9

**London**
▼14.3 ▲1.4

**South West**
▼8.9 ▲0.9

**South East**
▼12.5 ▲1

Lowest speeds

Highest speeds

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# UK Broadband speeds by postcode
Source: thinkbroadband.com speed test results January 2014

▼ Average **download** rate Mbps
▲ Average **upload** rate Mbps

## 10 slowest postcode areas

| | | | |
|---|---|---|---|
| Inverness (IV) | ▼ 5.4 | ▲ 0.5 |
| Galashiels (TD) | ▼ 5.4 | ▲ 0.5 |
| Lerwick (ZE) | ▼ 5.3 | ▲ 0.4 |
| Kirkwall (KW) | ▼ 5.3 | ▲ 0.4 |
| Shrewsbury (SY) | ▼ 5.1 | ▲ 0.5 |
| Perth (PH) | ▼ 5.0 | ▲ 0.4 |
| Hereford (HR) | ▼ 4.8 | ▲ 0.6 |
| Dumfries (DG) | ▼ 4.6 | ▲ 0.4 |
| Llandrindod Wells (LD) | ▼ 4.0 | ▲ 0.4 |
| Outer Hebrides (HS) | ▼ 3.2 | ▲ 0.4 |

## 10 fastest postcode area

| | | | |
|---|---|---|---|
| Cleveland (TS) | ▼ 19.0 | ▲ 1.8 |
| Romford (RM) | ▼ 18.0 | ▲ 1.9 |
| Enfield (EN) | ▼ 17.4 | ▲ 1.9 |
| Bromley (BR) | ▼ 17.2 | ▲ 1.6 |
| Manchester (M) | ▼ 17.0 | ▲ 1.9 |
| Uxbridge (UB) | ▼ 16.7 | ▲ 1.9 |
| Luton (LU) | ▼ 16.5 | ▲ 1.8 |
| Bolton (BL) | ▼ 16.2 | ▲ 1.3 |
| Kingston Upon Thames (KT) | ▼ 16.1 | ▲ 1.6 |
| North London (N) | ▼ 16.1 | ▲ 1.7 |
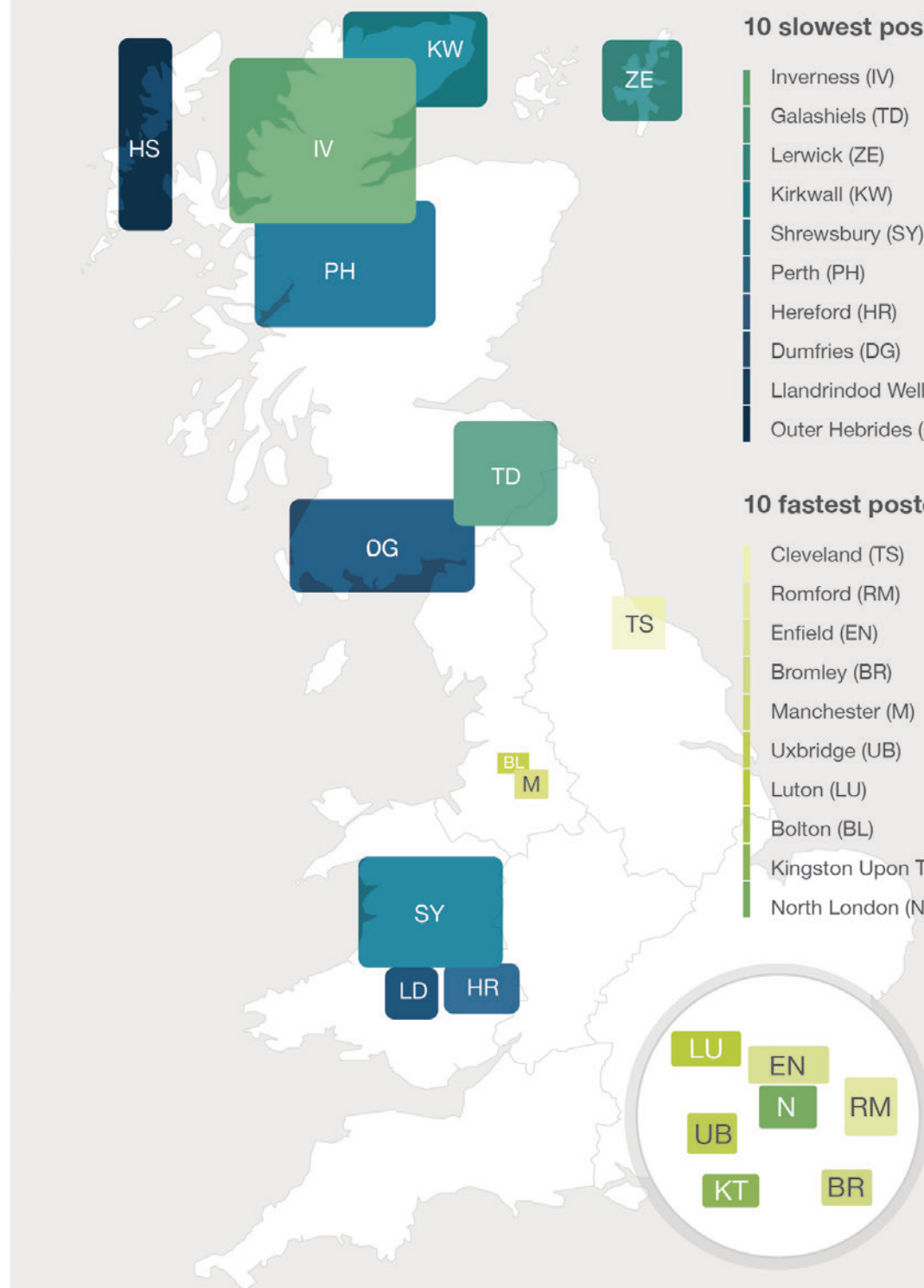
# Broadband timeline: August 2000~January 2014

| | |
|---|---|
| **AUG 2000** | Consumer 0.5 Mbps ADSL services launched. Freeserve launches at £150 /setup + £39.99/month. Read more |
| **FEB 2002** | Pipex launches first sub-£30 (incl. VAT) ADSL service. Industry follows later in month with wholesale price reductions. Read more |
| **NOV 2004** | BT Wholesale starts consumer IPStream Home 2000 (self-install 2 Mbps) trial. Read more |
| **APRIL 2005** | BT Group announces five million ADSL users. Read more |
| **SEPT 2005** | Be launch first ADSL2+ network in the UK, £24 for up to 24 Mbps. Read more |
| **MAR 2006** | BT Wholesale launches its up to 8 Mbps Max and Max Premium (rate-adaptive ADSL) products. Read more |
| **APRIL 2006** | TalkTalk launches telephone and 'free' broadband for a combined total of £21.99/month. Read more |
| **DEC 2008** | Virgin Media launches 50 Mbps broadband service. Read more |
| **JUN 2009** | Final Digital Britain Report published by Lord Carter calling for 2 Mbps Universal Service commitment by 2012. Read more |
| **MAY 2010** | BT announces 'two thirds' of UK will get FTTC/ FTTP fibre by 2015. Read more |
| **OCT 2010** | Virgin Media announces 100 Mbps service. Read more |
| **OCT 2010** | UK government announces its aim to have the "best broadband in Europe by 2015". Read more |
| **APRIL 2011** | Broadband users in the UK reaches 19.5 million. Read more |
| **FEB 2012** | Openreach announces FTTP on Demand for areas with FTTC to rollout in 2013. Read more |
| **SEPT 2012** | Cumbria signs BDUK contract with BT, 93% to have super fast broadband by end of 2015. Read more |
| **DEC 2012** | First BDUK funded cabinet installed in North Yorkshire. Read more |
| **JAN 2013** | B4RN FTTH network goes live in Arkholme Lancashire, the projects second village. Read more |
| **AUG 2013** | 100,000 premises passed by Broadband Delivery UK (BDUK) projects. Eventual goal is 4.5 million premises. Read more |
| **SEPT 2013** | Hyperoptic full fibre service available to 20,000 premises in London. Read more |
| **JAN 2014** | DCMS reports 273,731 premises now have superfast broadband available due to BDUK projects. Read more |

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# About thinkbroadband.com

**thinkbroadband.com** is an independent broadband information website (originally known as ADSLguide.org.uk) started by a group of keen early adopters seeking to share their experience on how to make the most of their broadband services.

The website pioneered **broadband speed testing** and continues to provide a number of innovative tools to help users including a **broadband quality monitor** and a **broadband usage meter** to help users track how much they use their broadband connection. It provides easy-to-understand guides on all aspects of broadband in the home.

The site also provides daily news and commentary on all aspects of broadband in the UK and has a flourishing community of users willing to help each other on a range of technical issues.

## SUBSCRIBING TO UPDATES

This factsheet will be updated quarterly and published on the thinkbroadband website. Advance copies can be provided to press on request - please contact **team@thinkbroadband.com** to request.

## CONTACT DETAILS:

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